



## **GR210 Managing Grant Awards**

**June 6, 2013**



# Table of Contents

<b>GR210.....</b>	<b>1</b>
<b>GR210 Managing Grant Awards.....</b>	<b>1</b>
Course Audiences and Prerequisites .....	1
Lesson 1: Creating and Managing a Grant Proposal .....	2
1.1 Creating a Proposal.....	2
1.2 Setting a Proposal to a "Submitted" Status .....	17
1.3 Proposal Inventory Listing .....	21
Lesson 2: Generating the Award and Establishing the Award Budget .....	22
2.1 Generating the Grant Award.....	22
2.2 Updating the Project Tree .....	26
2.3 Updating the Award Budget .....	28
Lesson 3: Updating the Grant Project & Project Activities .....	43
3.1 Updating a Grant Project .....	44
3.2 Updating Grant Project Activities.....	52
Lesson 4: Tracking Grant Costs and Expenses .....	57
4.1 Collecting and Analyzing Grant Purchasing Costs .....	57
4.1.1 Collecting Purchasing Costs into Project Costing .....	58
4.1.2 Reviewing Grant Purchasing Transactions .....	66
4.1.3 Collecting Purchasing Cost Adjustments .....	74
4.2 Collecting and Analyzing Grant Payables Costs.....	80
4.2.1 Collecting Cost from Payables.....	81
4.2.2 Reviewing Vouchers Created for a Grant .....	87
Lesson 5: Reviewing Grant Project Budget Activity .....	90
5.1 Reviewing Grant Project Budget Activity .....	90
Course Summary .....	99



## GR210

### GR210 Managing Grant Awards

#### Course Overview

The GEARS Grants application integrates tasks associated with sponsored research and supports the key business processes associated with the administration of sponsored research activities. Grants is not a standalone application, as it leverages functionality delivered within Customer Contracts, Project Costing, General Ledger and Billing processes to provide a fully integrated Grants management solution.

The *GR210 Managing Grant Awards* course discusses the business processes associated with Grants administration, including proposal and budget preparation and submission, award processing, award management and reporting, and award closeout. For Judiciary purposes, the GEARS Grants Management solution is used to manage grants/awards that are received from the State of Maryland or other Grant Sponsors.

#### Course Outline

The following course sections and lessons provide information and step-by-step instructions the grant award process:

- Course Audiences and Prerequisites
- Lesson 1: Creating and Managing a Grant Proposal
- Lesson 2: Generating the Award and Establishing the Award Budget
- Lesson 3: Updating the Grant Project and Project Activities
- Lesson 4: Tracking Grant Costs and Expenses
- Lesson 5: Reviewing Grant Project Budget Activity
- Course Summary

### Course Audiences and Prerequisites

#### Audience(s):

The Judiciary audiences for this course are:

- Administrative Office of the Courts
  - Court Operations
  - Family Administration
  - Office of Problem Solving Courts
- District Court - Headquarters
- Court of Special Appeals
  - Foster Care Court Improvement Project
- Court Related Agencies
  - MACRO
- State Law Library

#### GEARS Role(s):

This course is intended for Judiciary employees with the following role(s):

- GM Grant Coordinator



- GM Sponsor Project Ofc
- PC Grant Principal Investigator

### **Prerequisites:**

The recommended prerequisites for this course are:

- INT100 Introduction to GEARS
- GR100 Understanding GEARS Grants Management

## Lesson 1: Creating and Managing a Grant Proposal

### **Lesson Overview**

A proposal in the Grants consists of a statement of work, research plans, technical reports, and a proposal budget, as well as administrative, personnel, and submission information required by external funding agencies. Each proposal requires at least one project. You can, however, have multiple projects, or sub-proposals, within a single proposal.

After establishing basic setup information, you can enter information concerning proposals and projects, structure proposal budgets, work with research plans of principle investigators (PIs), and submit proposals to sponsors.

The GEARS Grants module provides application mapping to proposal formats that are accepted by most funding agencies. These forms simplify the process and facilitate their timely submission.

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Create and update a proposal
- Create a proposal budget
- Submit an approved proposal

### **1.1 Creating a Proposal**

To prepare a proposal, you create a proposal header and a project profile for each project within the proposal. Next, you assign professionals and sub-recipients to the projects. Then, you create a budget header and enter project details. Finally, you select the budgets that will be mapped to the proposal.

The proposal pages help you: track the development, verification, and submission status of proposals to sponsors, gather and organize proposal data, generate hard and soft copy proposals, and facilitate the administration of proposals, awards, forms, and reports.

After completing this topic, you will be able to:

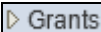

- Create a grant proposal

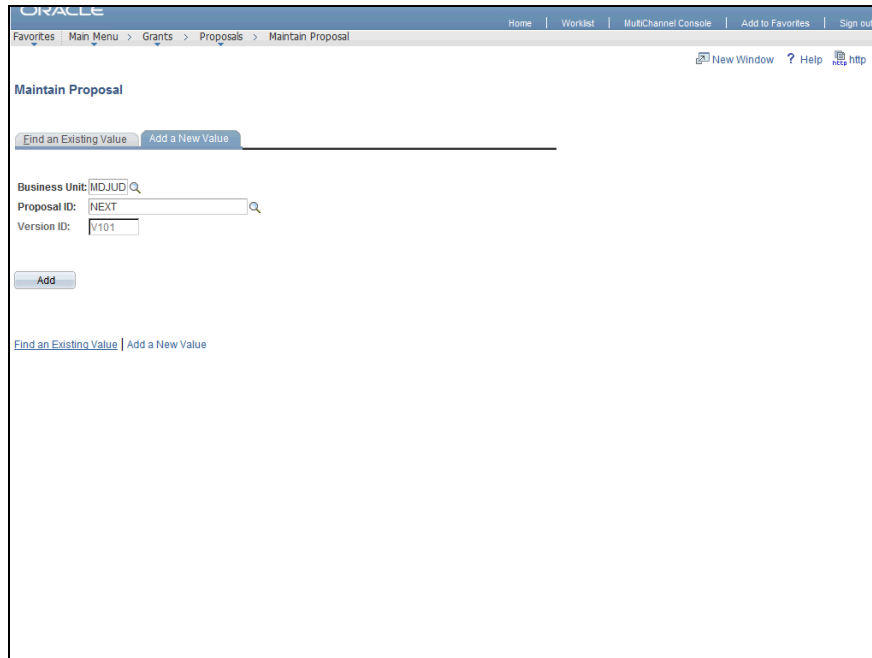
.

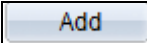


### Procedure

In this topic, you will be creating a grant proposal.

Step	Action
1.	Navigate to the <b>Maintain Proposal</b> page.  Click the <b>Grants</b> link and then the <b>Proposals</b> link. 
2.	Click the <b>Maintain Proposal</b> link in the Proposals pagelet. 

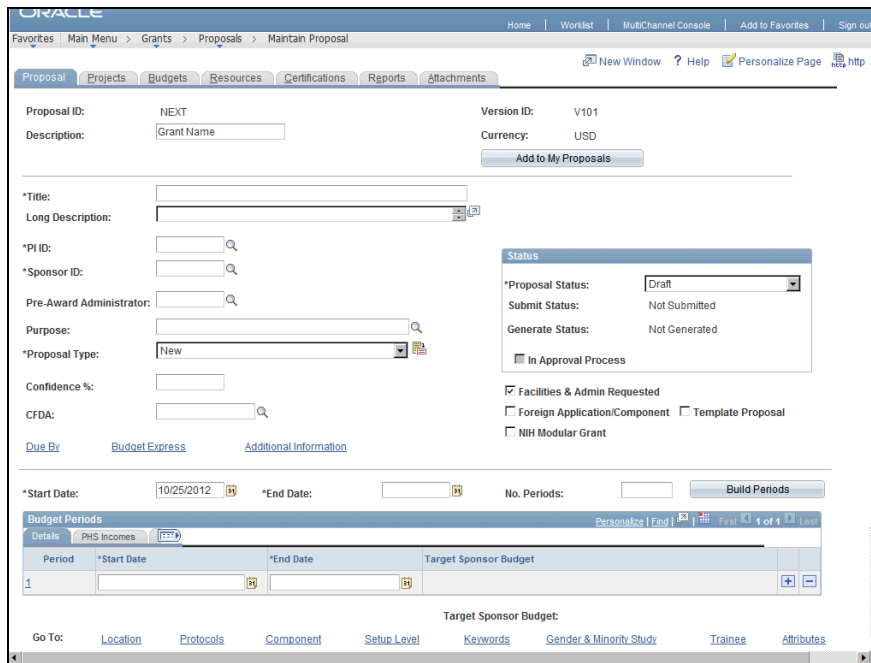


Step	Action
3.	The <b>Maintain Proposal</b> search page displays.  Accept the defaulted fields.  Click the <b>Add</b> button. 




# Training Guide

## GR210 Managing Grant Awards

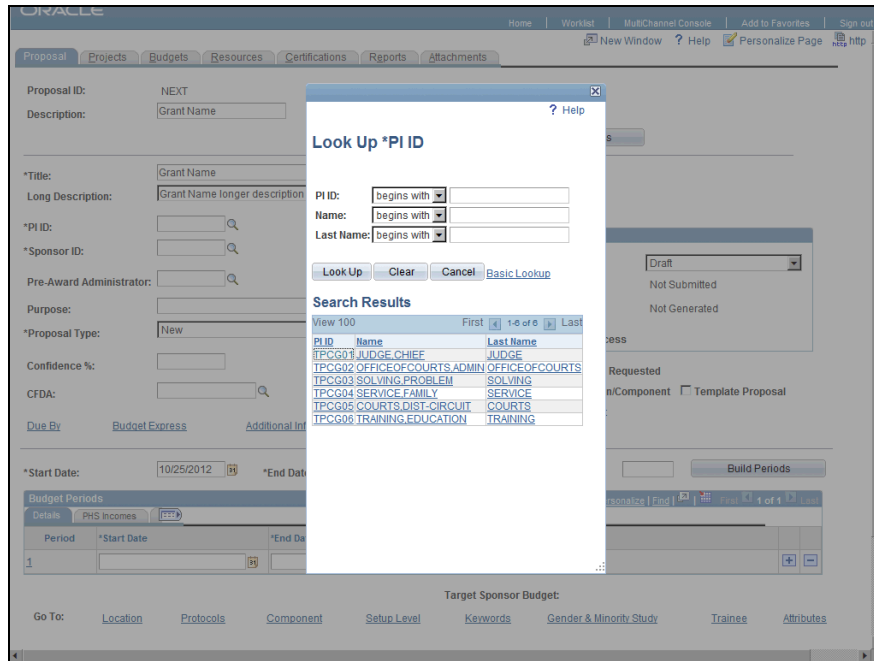


The screenshot shows the 'Maintain Proposal' screen in the ORACLE Grants system. The 'Proposal' tab is selected. The form contains the following fields and sections:

- Proposal ID:** NEXT
- Version ID:** V101
- Description:** Grant Name
- Currency:** USD
- Add to My Proposals** button
- Title:** (empty field)
- Long Description:** (empty field)
- PI ID:** (empty field with a magnifying glass icon)
- Sponsor ID:** (empty field with a magnifying glass icon)
- Pre-Award Administrator:** (empty field with a magnifying glass icon)
- Purpose:** (empty field)
- Proposal Type:** New
- Confidence %:** (empty field)
- CFDA:** (empty field with a magnifying glass icon)
- Status:** Draft
- Submit Status:** Not Submitted
- Generate Status:** Not Generated
- In Approval Process:** (checkbox)
- Facilities & Admin Requested:** (checkbox)
- Foreign Application/Component:** (checkbox)
- Template Proposal:** (checkbox)
- NIH Modular Grant:** (checkbox)
- Start Date:** 10/25/2012
- End Date:** (empty field)
- No. Periods:** (empty field)
- Budget Periods:** Table with columns: Period, Start Date, End Date, Target Sponsor Budget. Row 1: 1, 10/25/2012, (empty field), (empty field).
- Target Sponsor Budget:** (empty field)

Step	Action
4.	Enter the desired information into the <b>Description</b> field. Enter a valid value e.g. " <b>Grant Name</b> ".
5.	Enter the desired information into the <b>Title</b> field. Enter a valid value e.g. " <b>Grant Name</b> ".
6.	Enter the desired information into the <b>Long Description</b> field. Enter a valid value e.g. " <b>Grant Name longer description</b> ".
7.	Click the <b>Look Up PI ID</b> button. 






**Look Up \*PI ID**

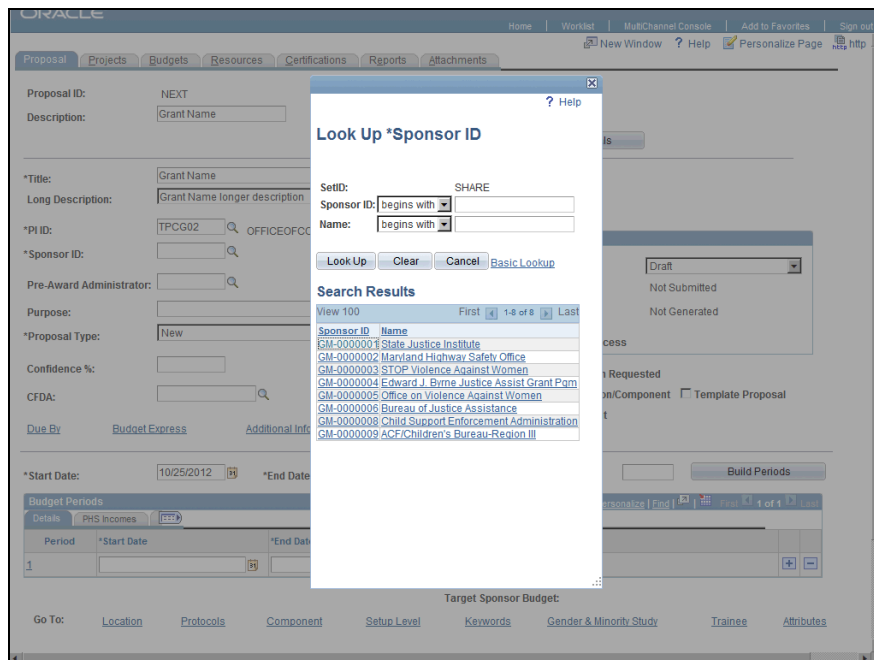
PI ID: begins with  
Name: begins with  
Last Name: begins with

Look Up Clear Cancel Basic Lookup

**Search Results**

View 100	First	1-6 of 6	Last
PI ID	Name	Last Name	
TPCG01	JUDGE CHIEF	JUDGE	
TPCG02	OFFICE OF COURTS ADMIN	OFFICE OF COURTS	
TPCG03	SOLVING PROBLEM	SOLVING	
TPCG04	SERVICE FAMILY	SERVICE	
TPCG05	COURTS DIST-CIRCUIT	COURTS	
TPCG06	TRAINING EDUCATION	TRAINING	

Step	Action
8.	Click the appropriate <b>PI ID</b> . <u>TPCG02</u>
9.	Click the <b>Look Up Sponsor ID</b> button. 



**Look Up \*Sponsor ID**

SetID: SHARE  
Sponsor ID: begins with  
Name: begins with

Look Up Clear Cancel Basic Lookup

**Search Results**

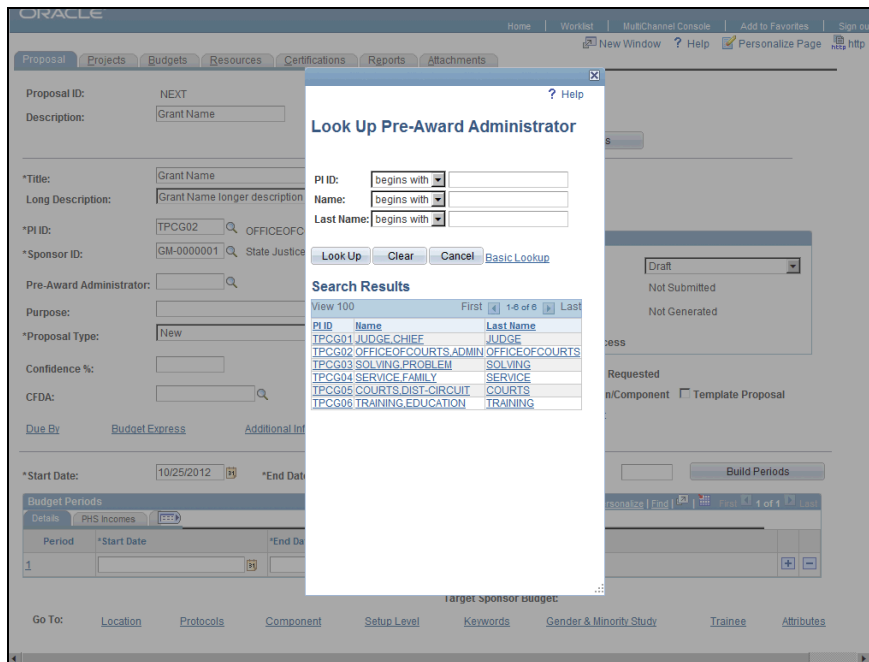
View 100	First	1-6 of 6	Last
Sponsor ID	Name		
GM-0000001	State Justice Institute		
GM-0000002	Maryland Highway Safety Office		
GM-0000003	STOP Violence Against Women		
GM-0000004	Edward J. Byrne Justice Assist Grant Pgm		
GM-0000005	Office on Violence Against Women		
GM-0000006	Bureau of Justice Assistance		
GM-0000008	Child Support Enforcement Administration		
GM-0000009	ACF/Children's Bureau-Region III		



# Training Guide

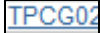

## GR210 Managing Grant Awards

Step	Action
10.	Select the appropriate <b>Sponsor ID</b> . 
11.	Click the <b>Look Up Pre-Award Administrator</b> button. 

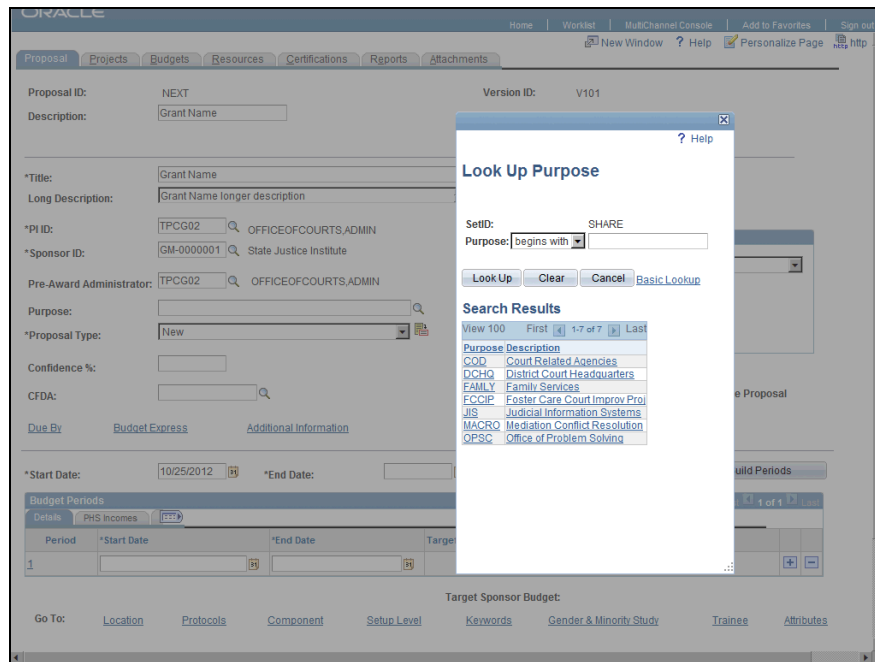




The screenshot shows the Oracle GR210 Managing Grant Awards interface. A modal dialog box titled "Look Up Pre-Award Administrator" is open. It contains search criteria fields for PI ID, Name, and Last Name, each with a "begins with" dropdown and a text input. Below these are "Look Up", "Clear", and "Cancel" buttons, along with a "Basic Lookup" link. A "Search Results" table is displayed, showing a list of administrators with columns for PI ID, Name, and Last Name. The first result is TPCG01 JUDGE CHIEF JUDGE. The background interface shows various tabs like Proposal, Projects, Budgets, Resources, Certifications, Reports, and Attachments, along with a "Draft" dropdown and a "Build Periods" button.

PI ID	Name	Last Name
TPCG01	JUDGE CHIEF	JUDGE
TPCG02	OFFICE OF COURTS ADMIN	OFFICE OF COURTS
TPCG03	SOLVING PROBLEM	SOLVING
TPCG04	SERVICE FAMILY	SERVICE
TPCG05	COURTS DIST-CIRCUIT	COURTS
TPCG06	TRAINING EDUCATION	TRAINING

Step	Action
12.	Select the appropriate <b>Pre-Award Administrator</b> . 
13.	Click the <b>Look Up Purpose</b> button. 



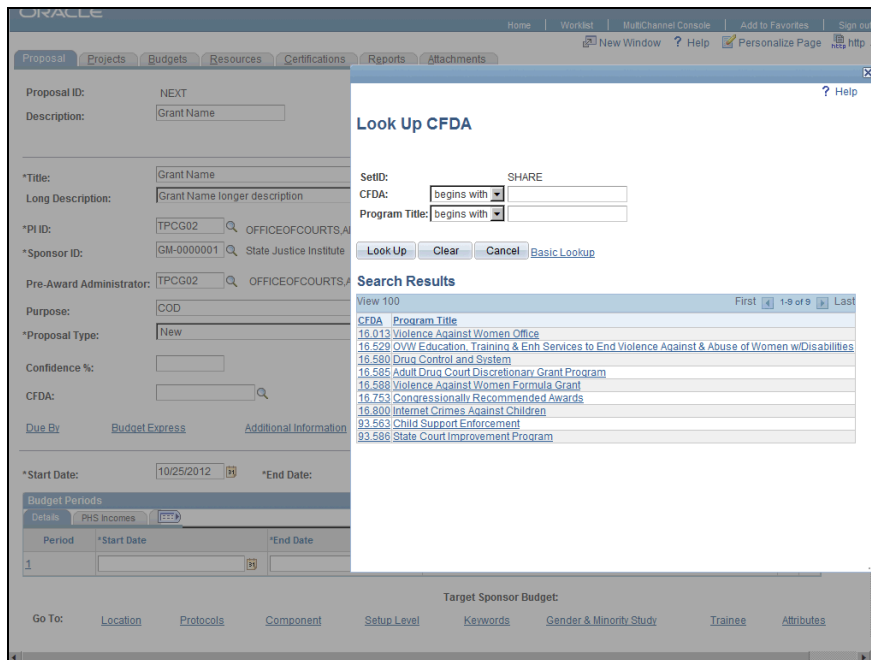


Step	Action
14.	Select the appropriate <b>Purpose</b> link. 
15.	Enter the desired information into the <b>Confidence %</b> field. Enter a valid value e.g. " <b>100</b> ".
16.	Click the <b>Look Up CFDA</b> option. 



# Training Guide

## GR210 Managing Grant Awards

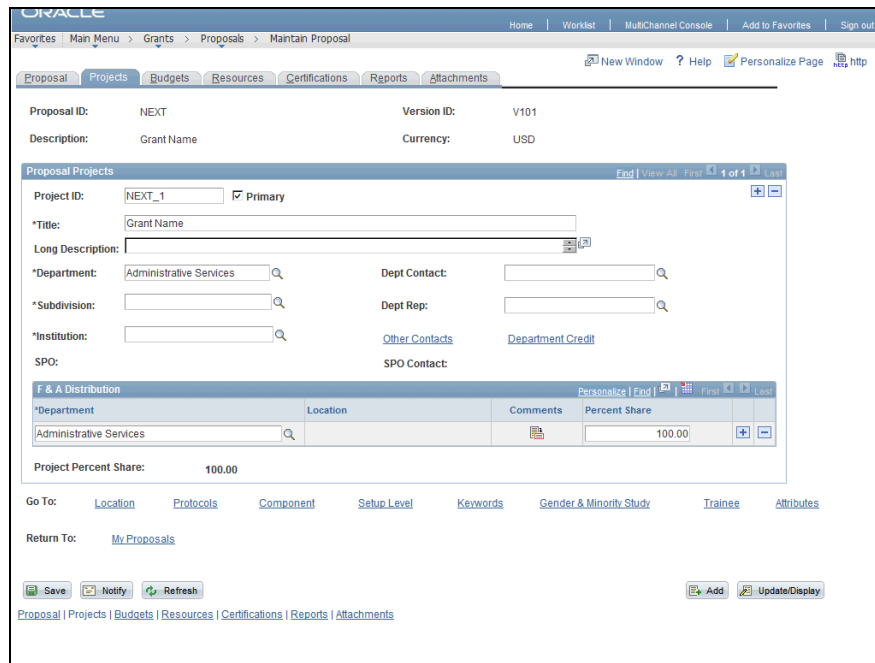


The screenshot shows the Oracle GR210 Managing Grant Awards interface. The 'Look Up CFDA' dialog box is open, displaying search criteria and results. The search results list includes the following items:

CFDA Program Title
16.013 Violence Against Women Office
16.529 QW Education, Training & Enh Services to End Violence Against & Abuse of Women w/Disabilities
16.580 Drug Control and System
16.585 Adult Drug Court Discretionary Grant Program
16.588 Violence Against Women Formula Grant
16.753 Congressionally Recommended Awards
16.800 Internet Crimes Against Children
93.563 Child Support Enforcement
93.586 State Court Improvement Program

Step	Action
17.	Select the appropriate <b>CFDA</b> link. <u>93.586 State Court Improvement Program</u>
18.	Click the <b>Facilities &amp; Admin Requested</b> option to de-select it. <input checked="" type="checkbox"/> <b>Facilities &amp; Admin Requested</b>
19.	Enter a date in the <b>Start Date</b> field. Enter beginning of the fiscal year as the date. In this example, enter " <b>07/01/2012</b> ".
20.	Enter a date in the <b>End Date</b> field. Enter the end of the fiscal year as the date. In this example, enter " <b>06/30/2013</b> ".
21.	Enter the desired information into the <b>No. Periods</b> field. Enter a valid value. For this example, enter " <b>1</b> ".
22.	Click the <b>Build Periods</b> button. <b>Build Periods</b>
23.	Click the <b>Projects</b> tab. <b>Projects</b>





ORACLE  
Favorites | Main Menu > Grants > Proposals > Maintain Proposal

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Proposal Projects | Budgets | Resources | Certifications | Reports | Attachments

Proposal ID: NEXT Version ID: V101  
Description: Grant Name Currency: USD

Proposal Projects  
Project ID: NEXT\_1 ☒ Primary  
\*Title: Grant Name  
Long Description:  
\*Department: Administrative Services Dept Contact:  
\*Subdivision: Dept Rep:  
\*Institution: Other Contacts Department Credit  
SPO: SPO Contact:

F & A Distribution  
Department Location Comments Percent Share  
Administrative Services 100.00


Project Percent Share: 100.00

Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Return To: My Proposals

Save Notify Refresh Add Update/Display

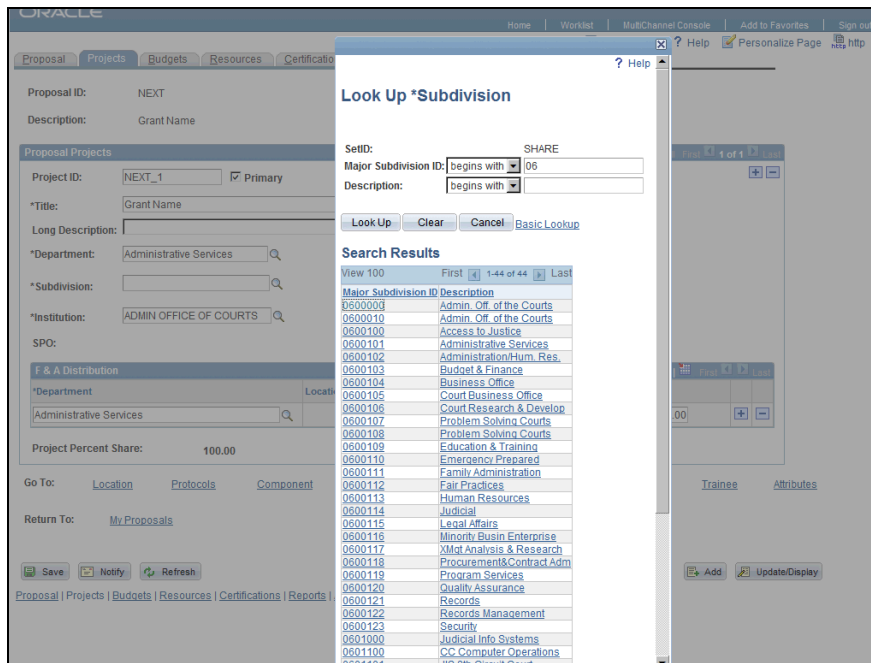
Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments

Step	Action
24.	<p>The <b>Projects</b> tab displays.</p> <p>Enter the desired information into the <b>Institution</b> field. Change the project ID from the NEXT value. The project ID will be a smart coded ID based on the fiscal year, a short acronym for describing the project with 10 characters. When the proposal is generated into an award this project ID will be changed to include the PCA value.</p> <p>Enter a valid value e.g. "<b>ADMIN OFFICE OF COURTS</b>".</p>
25.	<p>Enter the desired information into the <b>Dept Rep</b> field. Enter a valid value. For this example, enter "<b>OFFICE OF COURTS, ADMIN</b>".</p>
26.	<p>Click the <b>Look Up Subdivision</b> button.</p> 



# Training Guide

## GR210 Managing Grant Awards



The screenshot shows the Oracle GR210 Managing Grant Awards interface. A 'Look Up \*Subdivision' dialog box is open, displaying search criteria and a list of search results. The background shows the main application window with tabs for Proposal, Projects, Budgets, Resources, and Certification.

**Look Up \*Subdivision**

SetID: SHARE

Major Subdivision ID: begins with 06




Description: begins with

Buttons: Look Up, Clear, Cancel, Basic Lookup

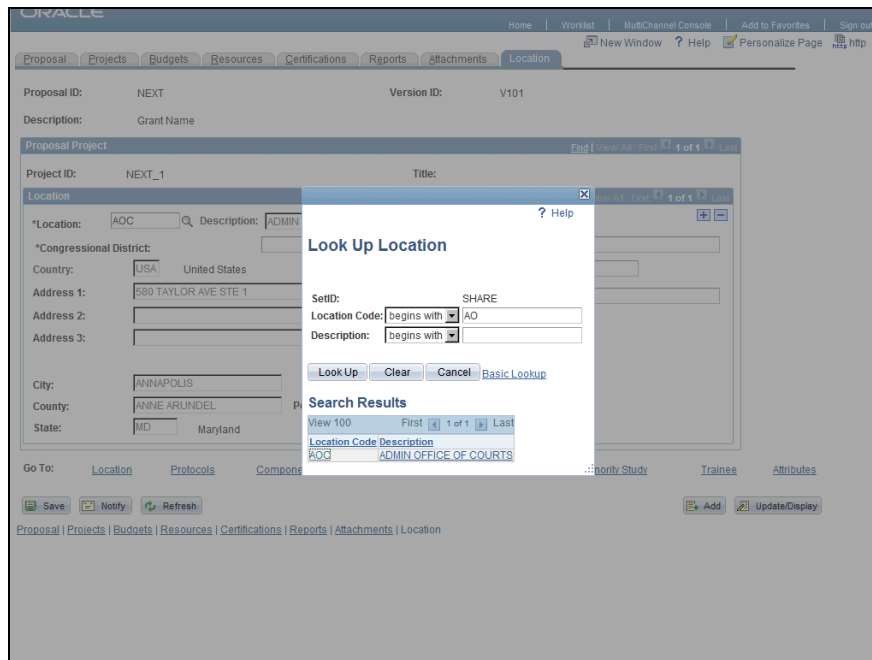
**Search Results**


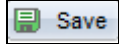
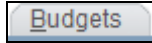
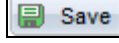

View 100 First 1-44 of 44 Last

Major Subdivision ID	Description
0600008	Admin. Off. of the Courts
0600010	Admin. Off. of the Courts
0600100	Access to Justice
0600101	Administrative Services
0600102	Administration/Hum. Res.
0600103	Budget & Finance
0600104	Business Office
0600105	Court Business Office
0600106	Court Research & Develop
0600107	Problem Solving Courts
0600108	Problem Solving Courts
0600109	Education & Training
0600110	Emergency Prepared
0600111	Family Administration
0600112	Fair Practices
0600113	Human Resources
0600114	Judicial
0600115	Legal Affairs
0600116	Minority Busin Enterprise
0600117	XMgt Analysis & Research
0600118	Procurement&Contract Adm
0600119	Program Services
0600120	Quality Assurance
0600121	Records
0600122	Records Management
0600123	Security
0601000	Judicial Info Systems
0601100	CS-Computer Operations
0601101	CS-Computer Support

Step	Action
27.	Select the appropriate <b>Major Subdivision ID</b> link. 
28.	Click the <b>Location</b> link. 
29.	The <b>Location</b> tab displays.  Click the <b>Look up Location (Alt+5)</b> button. 





Step	Action
30.	Click the <b>AOC</b> link. 
31.	Click the <b>Save</b> button. 
32.	Click the <b>Budgets</b> tab. 
33.	The Budgets tab displays.  Click in the <b>Description</b> field. Enter the appropriate description. In this example, " <b>Grant Project Activity</b> " is entered.
34.	Click the <b>Save</b> button. 
35.	Click the <b>1</b> link in the Budget Period table. 

Example from a different project to show



# Training Guide

## GR210 Managing Grant Awards



**ORACLE** Home | Worklist

Favorites | Main Menu > Grants > Proposals > Maintain Proposal

Proposal ID: TEST\_2013      Version ID: V101  
 Description: Test grant proposal      Currency: USD  
[Add to My Proposals](#)

---

\*Title: Test grant proposal  
 Long Description:

\*PI ID: 214604477 LAVELLE,CONNIE  
 \*Sponsor ID: GM-0000003 STOP Violence Against Women  
 Pre-Award Administrator: 212660544 KELLEHER,LYNNE  
 Purpose: FAMILY  
 \*Proposal Type: New  
 Confidence %: 100  
 CFDA: 16.529

**Status**

\*Proposal Status: Awarded  
 Submit Status: Submitted  
 Generate Status: Contract Generated  
☐ In Approval Process

☐ Facilities & Admin Requested  
☐ Foreign Application/Component  
☐ NIH Modular Grant

[Due By](#)    [Budget Express](#)    [Additional Information](#)

---

\*Start Date: 10/01/2012      \*End Date: 09/30/2013      No. Periods:  [Build Periods](#)

**Budget Periods** Personalize | Find | First 1 of 1 Last

Period	*Start Date	*End Date	Target Sponsor Budget
1	10/01/2012	09/30/2013	200,391.00

**ORACLE** Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Grants > Proposals > Maintain Proposal

[New Window](#) ? [Help](#) [Personalize Page](#) [http](#)

### Enter Budget Detail

Proposal: GRP0000000000002      Currency: USD  
 Version: V101      Start Date: 07/01/2012      End Date: 06/30/2013  
 Title: Grant Name      ☐ Modular?

Project ID: 0000000000000002      Budget Period: 1      [Overall Cost Share](#)  
 Budget ID: GRANT      Start Date: 07/01/2012      End Date: 06/30/2013      [View FA Rate](#)

**Details, CostShare, Justification** Personalize | Find | First 1 of 1 Last

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share
10				0.00	0.00	<a href="#">Cost Share</a>			

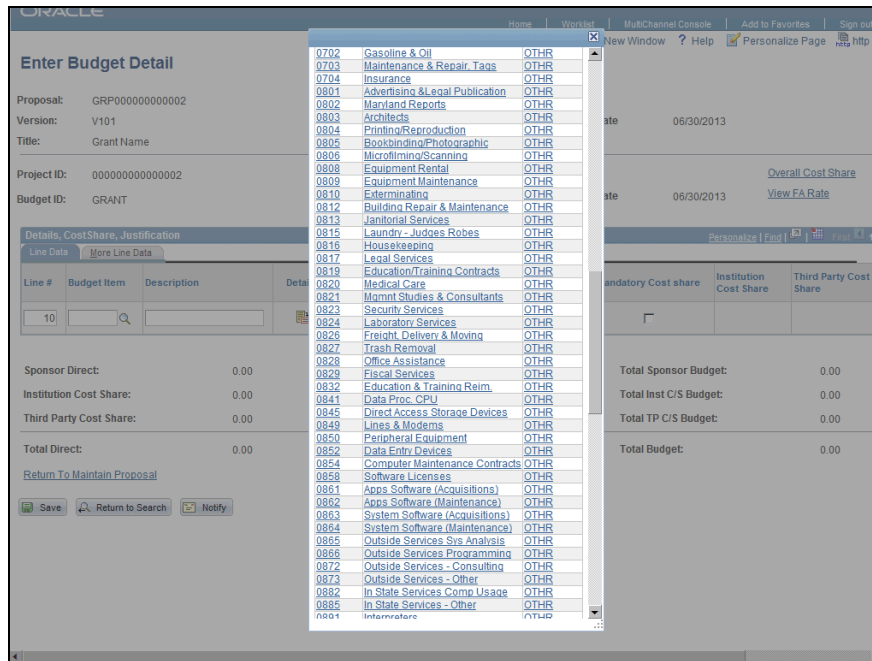
Sponsor Direct: 0.00      Sponsor F&A: 0.00      Total Sponsor Budget: 0.00  
 Institution Cost Share: 0.00      Institution Cost Share F&A: 0.00      Total Inst C/S Budget: 0.00  
 Third Party Cost Share: 0.00      Total TP C/S Budget: 0.00  
 Total Direct: 0.00      Total F&A: 0.00      Total Budget: 0.00

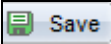
[Return To Maintain Proposal](#)

[Save](#)    [Return to Search](#)    [Notify](#)



Step	Action
36.	<p>The <b>Enter Budget Detail</b> page displays.</p> <p>Click the <b>Look Up Budget Item</b> button.</p> 

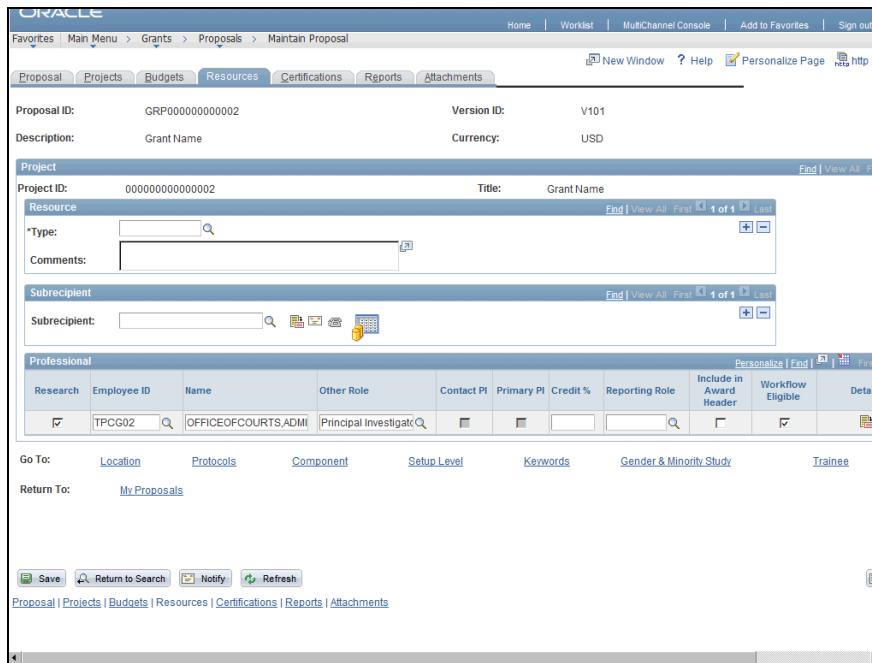


Step	Action
37.	<p>Click the <b>0872</b> link.</p> <p><b>0872</b> <b>Outside Services - Consulting</b> <b>OTHR</b></p>
38.	<p>Enter the desired information into the <b>Total Direct</b> field. Enter a valid value. For this example, enter "<b>100000</b>".</p>
39.	<p>Click the <b>Save</b> button.</p> 
40.	<p>Click the <b>Return To Maintain Proposal</b> link.</p> <p><b>Return To Maintain Proposal</b></p>
41.	<p>Click the <b>Resources</b> tab.</p> <p><b>Resources</b></p>



# Training Guide

## GR210 Managing Grant Awards








Oracle  
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out



Favorites | Main Menu > Grants > Proposals > Maintain Proposal

Proposal ID: GRP000000000002 Version ID: V101  
Description: Grant Name Currency: USD

Project  
Project ID: 000000000000002 Title: Grant Name





Resource  
\*Type:    
Comments:

Subrecipient  
Subrecipient:     




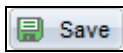

Research	Employee ID	Name	Other Role	Contact PI	Primary PI	Credit %	Reporting Role	Include in Award Header	Workflow Eligible	Details
<input checked="" type="checkbox"/>	TPCG02	OFFICEOFCOURTS.ADMI	Principal Investigat		<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Go To: [Location](#) [Protocols](#) [Component](#) [Setup Level](#) [Keywords](#) [Gender & Minority Study](#) [Trainee](#)

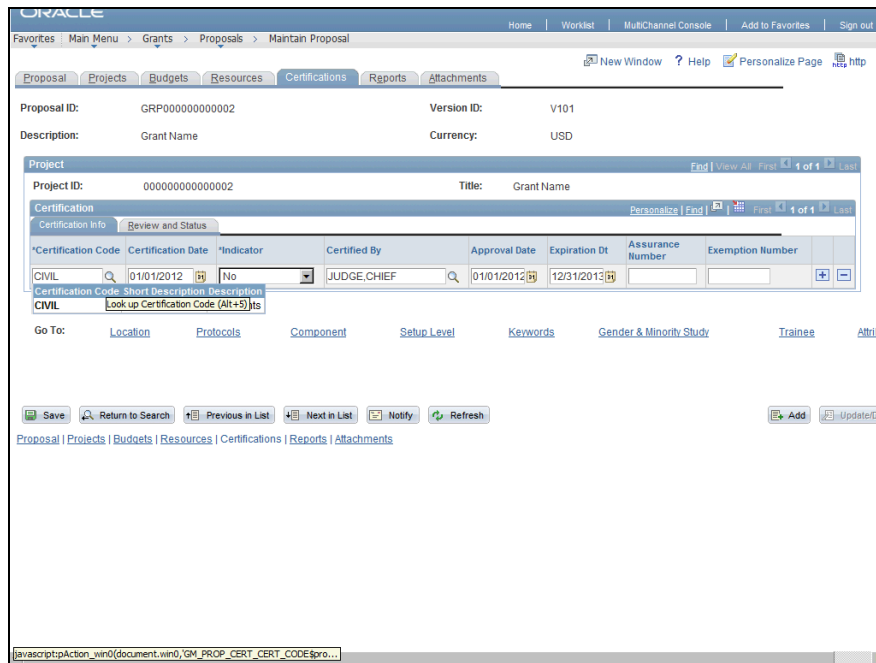
Return To: [My Proposals](#)




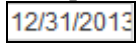
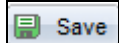
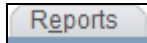
 Save  Return to Search  Notify  Refresh

[Proposal](#) | [Projects](#) | [Budgets](#) | [Resources](#) | [Certifications](#) | [Reports](#) | [Attachments](#)

Step	Action
42.	The <b>Resources</b> tab displays.  Move the scrollbar to the right to add a new row.
43.	Click the <b>Add a new row at row 1</b> button. 
44.	Click the <b>Look up Employee ID</b> button. 
45.	Click the <b>TPCG01</b> link, for example. Choose employees that are associated with the Grant. 
46.	Click the <b>Save</b> button. 
47.	Click the <b>Certifications</b> tab. 



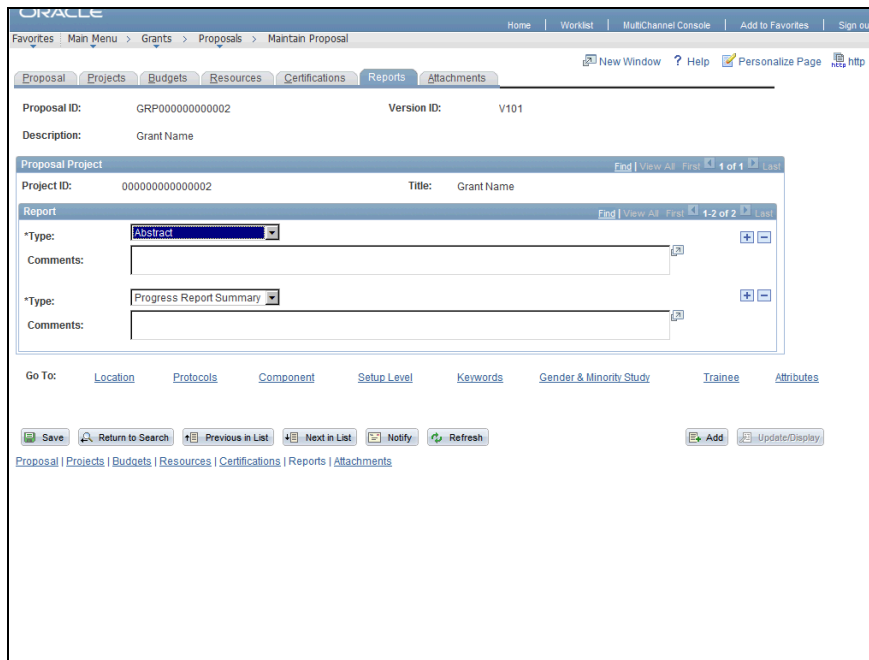


Step	Action
48.	The <b>Certifications</b> tab displays.  Click the <b>Look up Certification Code (Alt+F5)</b> button. 
49.	Select the appropriate <b>Certification Code</b> . 
50.	Click the <b>Look up Indicator</b> . In this example, " <b>No</b> " is selected. 
51.	Enter the desired information into the <b>Certified By</b> field. Enter a valid value. For this example, enter " <b>JUDGE,CHIEF</b> ".
52.	Enter a date in the <b>Approval Date</b> field. Enter a date prior to grant start date. In this example, " <b>01/01/2012</b> " is selected.
53.	Enter a date in the <b>Expiration Dt</b> field. Enter a date after the grant end date. In this example, enter " <b>12/31/2013</b> ". 
54.	Click the <b>Save</b> button. 
55.	Click the <b>Reports</b> tab. 



# Training Guide

## GR210 Managing Grant Awards



Oracle Grants - Maintain Proposal

Proposal ID: GRP000000000002 Version ID: V101

Description: Grant Name

Proposal Project

Project ID: 000000000000002 Title: Grant Name

Report

\*Type: **Abstract** [Add] [Remove]






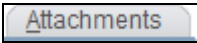

Comments: [Text Area]

\*Type: **Progress Report Summary** [Add] [Remove]

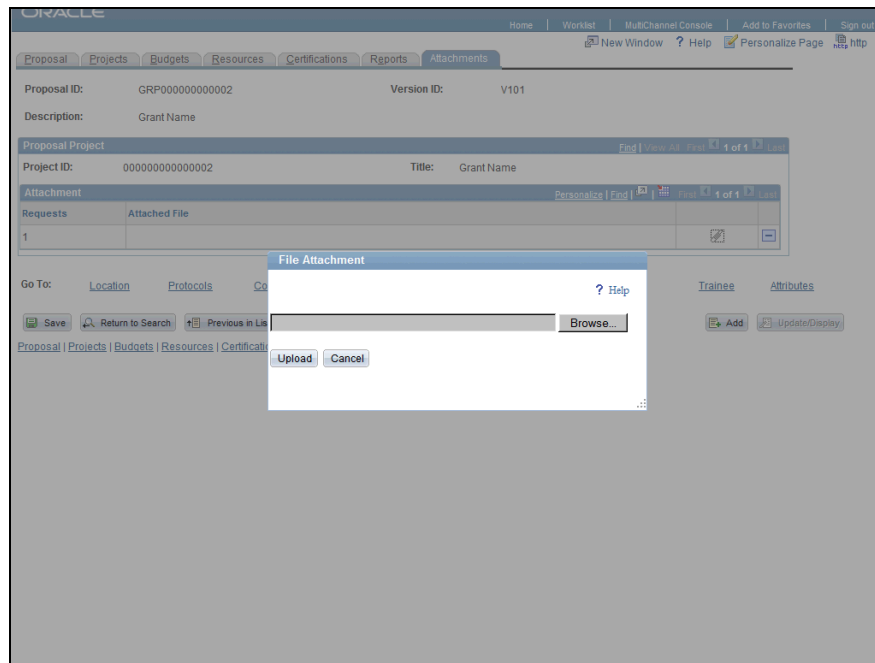
Comments: [Text Area]

Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Step	Action
56.	The <b>Reports</b> tab displays.  Click the <b>Type</b> list. 
57.	Click the <b>Abstract</b> list item. 
58.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
59.	Click the <b>Type</b> list for row 2. 
60.	Click the <b>Progress Report Summary</b> list item. 
61.	Click the <b>Attachments</b> tab. 
62.	Click the <b>paperclip</b> to browse for file to be attached. 





Step	Action
63.	Enter the appropriate location of your file or click the <b>Browse</b> button.
64.	<p>You have successfully completed the <i>Creating a Proposal</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Create a proposal with attachments</li> </ul> <p><b>End of Procedure.</b></p>

## 1.2 Setting a Proposal to a "Submitted" Status

After proposal information is completed, you should submit the proposal to the sponsor. Use the **Proposal** page to change the proposal's status to Pending Approval. Next, use the **Submission** page to set up the proper parameters for submitting your proposal. Finally, use the **Official** page to enter information regarding the approval and submission officials for the proposal.

**NOTE:** The approval process will take place outside of GEARS. After the proposal is approved, the proper individual will manually input their approval into GEARS. In this topic, the proposal will be submitted.



After completing this topic, you will be able to:

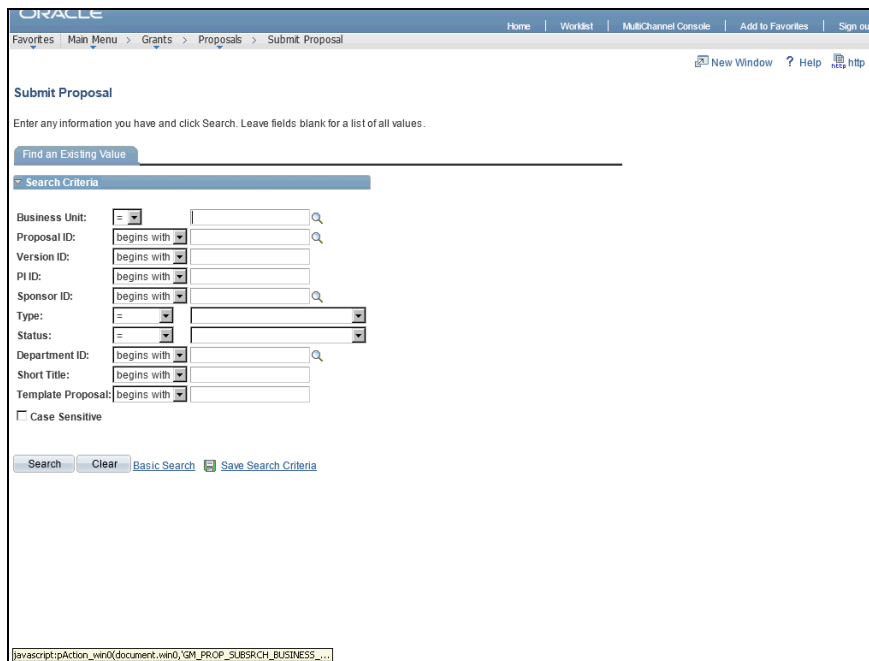
- Prepare the proposal for award generation.

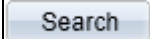
### Procedure

After entering the proposal information, you can submit the proposal to the sponsor. In this topic, you will submit a grant proposal.



Step	Action
1.	Navigate to the <b>Submit Proposal</b> page.  Click the <b>Grants</b> link. 
2.	Click the <b>Submit Proposal</b> link. 



Step	Action
3.	The <b>Submit Proposal</b> search page displays.  You must enter the business unit to conduct your search. Other search criteria are optional.  Enter a valid value. For this example, enter " <b>MDJUD</b> " into the <b>Business Unit</b> field.
4.	Enter other search criteria, as needed, to narrow your search results. For example, you may want to search by proposal <b>Status</b> , <b>Sponsor ID</b> , or <b>PI ID</b> .
5.	Click the <b>Search</b> button. 



ORACLE  
Favorites | Main Menu > Grants > Proposals > Submit Proposal

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window ? Help http

### Submit Proposal

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

**Search Criteria**

Business Unit: = MDJUD

Proposal ID: begins with

Version ID: begins with

PI ID: begins with

Sponsor ID: begins with

Type: =

Status: =

Department ID: begins with

Short Title: begins with

Template Proposal: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

### Search Results

View All First 1-3 of 3 Last

Business Unit	Proposal ID	Version ID/PI ID	Sponsor ID	Type	Status	Department ID	Short Title	Template Proposal
MDJUD	GRP00000000000001	V101	TPCG02-GM-00000001	New	Draft	0600101	Grant Name	N
MDJUD	GRP00000000000002	V101	TPCG02-GM-00000001	New	Awarded	0600101	Grant Name	N
MDJUD	UNITTEST-GMCAPC-V101		TPCG03-GM-00000002	New	Awarded	0600102	Unit Test Grant Proposal to Award Contract Project N	N

Step	Action
6.	<p>Proposals matching your search criteria display in the <b>Search Results</b> grid.</p> <p>Click the Proposal ID link for the proposal you would like to review and submit.</p> <p><u>UNITTEST-GMCAPC</u></p>

ORACLE  
Favorites | Main Menu > Grants > Proposals > Submit Proposal

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window ? Help Personalize Page http

Submission Official

Proposal ID: GRP00000000000002 Title: Grant Name

Version ID: V101 PI Name: OFFICEOFCOURTS.ADMN

Proposal Status: Draft \*Submit Status: Not Submitted

Proposal Valid From: Proposal Valid To:

Received: Transmission By:

Sponsor Proposal ID:

Sponsor: State Justice Institute

Location:




Submitted On:

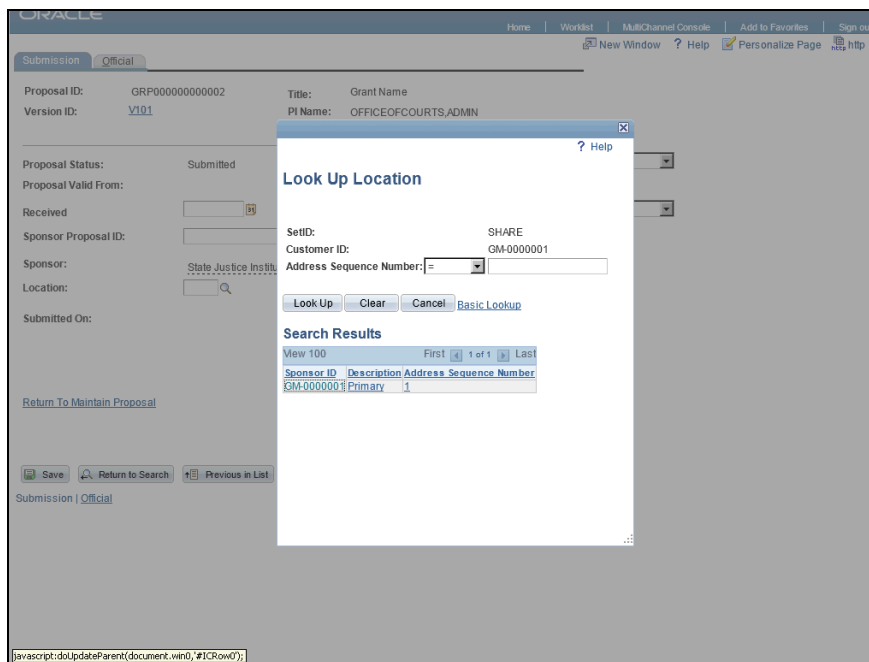
[Return To Maintain Proposal](#)



Save Return to Search Previous in List Next in List Notify

Submission | Official



Step	Action
7.	The proposal <b>Submission</b> page displays.  Use the <b>Submission</b> page to set up the proper parameters for submitting a proposal.
8.	Click the <b>Submit Status</b> list. 
9.	Click <b>Submitted</b> from the list item. 
10.	Click the <b>Look up Location (Alt+5)</b> button. 



Step	Action
11.	Click the appropriate <b>Sponsor ID</b> . In this example, click the <b>GM-0000001</b> link. 
12.	Enter a sponsor ID for the grant award sponsor into the <b>Sponsor Proposal ID</b> field.
13.	Click the <b>Save</b> button. 
14.	Click on the <b>Return To Maintain Proposal</b> link.



Step	Action
15.	<p>You have successfully completed the <i>Setting a Proposal to Submitted</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Submit a proposal</li> </ul> <p><b>End of Procedure.</b></p>

### 1.3 Proposal Inventory Listing

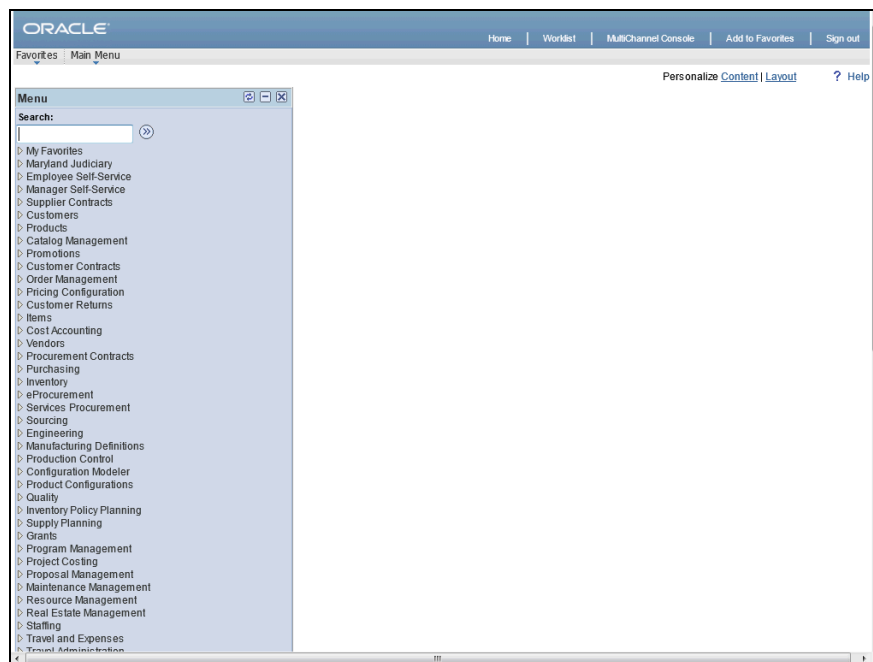
Once you implement Grants and begin generating proposals, awards and budgets, you can review the inventory of awards and proposals as well as view the projected budget and revenue information and variances in budgeted and actual amounts.

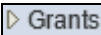
After completing this topic, you will be able to:

- Review previously loaded Grant information.



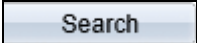

#### Procedure

In this topic, you will be reviewing previously loaded Grant information.



Step	Action
1.	<p>Begin by navigating to the <b>Proposal Inventory</b> page.</p> <p>Click the <b>Grants</b> link.</p> 



Step	Action
2.	Click the <b>Interactive Reports</b> link. 
3.	Click the <b>Proposal Inventory</b> link. 
4.	In order to search for the specific grant that we want to review, we need to identify certain criteria; starting with the <b>Business Unit</b> . "MDJUD" should show automatically in the Business Unit field. If not, enter <b>MDJUD</b> .  Click the <b>Search</b> button. 
5.	Be sure that the Award ID <b>JGR-GMCAPC01</b> is displayed as this is the Award you will be reviewing.  Click the <b>More Info</b> object. 
6.	You have successfully completed the <i>Proposal Inventory Listing</i> topic.  You have learned to: - Review previously loaded Grant information. <b>End of Procedure.</b>

## Lesson 2: Generating the Award and Establishing the Award Budget

### Lesson Overview

After you are awarded funding by a sponsor, you initiate the award generation process which populates the award pages with data that was defined in the grant proposal. The award generation process also generates a contract and creates the necessary setup to manage your award transactions.

The final step to prepare an award for processing is to establish the award budget and submit it to Commitment Control. When you run the Generate Award process, the system populates the **Budget Detail** page in Project Costing with summarized budget information. At this point, you still need to assign required ChartFields to the individual budget journals, and make any additions or modifications prior to finalization of the budget. Only after the budget is finalized can you apply transactions against it.

### Lesson Objectives

After completing this lesson, you will be able to:

- Generate an award
- Update an award budget

### 2.1 Generating the Grant Award

When the sponsor sends an award notification, this starts the process to generate a grant award. The approval to generate the grant award occurs outside of the GEARS system.



You initiate the award generation process after you are awarded funding. This process populates the award pages with data that you set up in your proposal. The award generation process also generates a contract and creates the necessary setup to manage your award transactions.

When you run the award generation process, a customer contract, a project and a project activity are created. These documents must be updated after they have been created.

After completing this topic, you will be able to:

- Generate a grant award with the associated customer contract, project and project activity.

#### Procedure

When the Sponsor Office sends an award notification, this starts the process to generate a grant award.

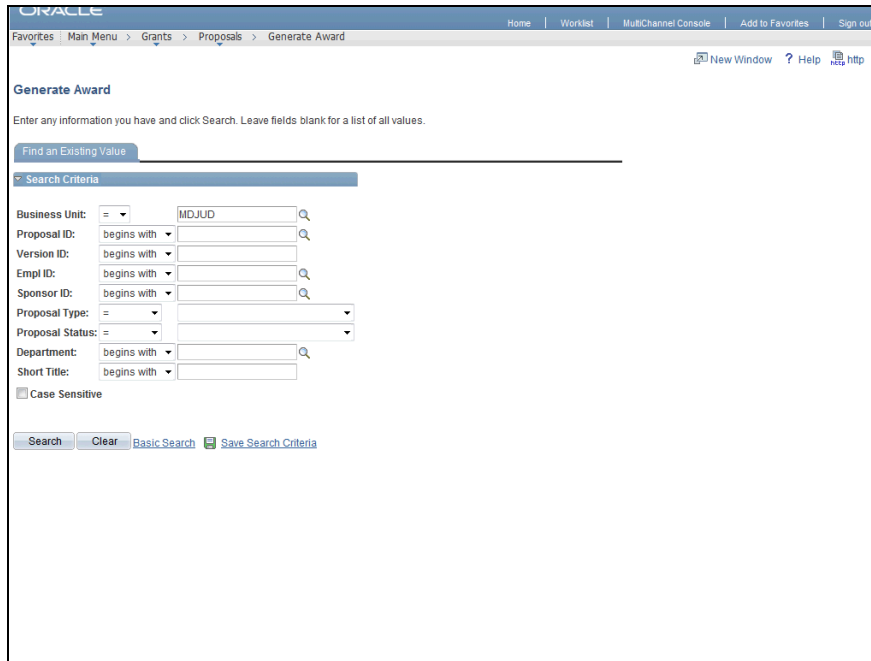
In this topic, the 'generate a grant award' process will create a customer contract, a project and a project activity.

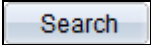
Step	Action
1.	Navigate to the <b>Generate Awards</b> page.  Click the <b>Grants</b> link. <a href="#">▶ Grants</a>
2.	Click the <b>Proposals</b> link. <a href="#">Proposals</a>
3.	Click the <b>Generate Award</b> link. <a href="#">Generate Award</a>



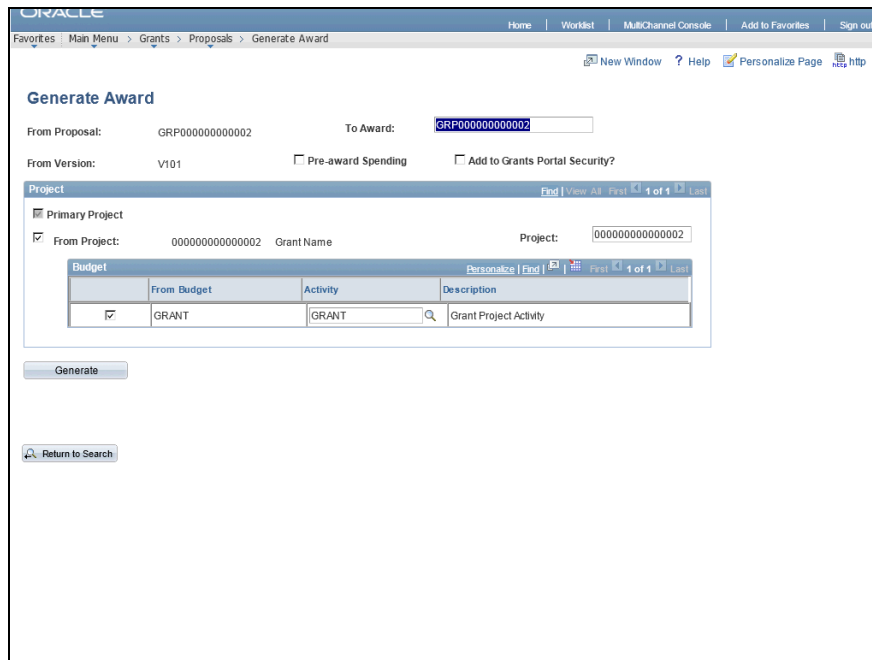
# Training Guide

## GR210 Managing Grant Awards




Step	Action
4.	The <b>Generate Award</b> search page displays.  Enter the desired information into the <b>Business Unit</b> field. Enter " <b>MDJUD</b> ".
5.	Click the <b>Search</b> button. This will display a list of proposals with "submitted" status. 





Step	Action
6.	<p>The <b>Generate Award</b> page displays.</p> <p>Use the <b>Generate Award</b> page to initiate the award administration process by copying information from the proposal pages to the award pages.</p>
7.	<p>Enter the desired information into the <b>To Award</b> field. This is the opportunity to use a different value for the Award/Contract ID than the Proposal ID. Use the Sponsors Award ID.</p> <p>For this example, enter "<b>SPONSORAWARD#</b>".</p>
8.	<p>Use the <b>Add to Grants Portal Security?</b> option to grant portal security to employees. When this option is selected, all users that are associated with the department and division are automatically granted access to the awards and projects selected on this page.</p> <p>In addition, all users who have global access receive access to the awards and projects using this process.</p> <p>Click the <b>Add to Grants Portal Security?</b> option.</p> <div> <input type="checkbox"/> <b>Add to Grants Portal Security?</b> </div>
9.	<p>Enter the desired information into the <b>Project</b> field. Enter "<b>AOCPROJECT#</b>".</p> <p>Change the Project ID. The Project ID will be a smart coded ID based on the fiscal year, a short acronym for describing the project and the PCA value. The proposal project value that defaulted from the proposal projects tab does not include the PCA value. A new PCA value may have to be obtained from DBF.</p>



Step	Action
10.	Click on the <b>Generate</b> button. Security for the UserID is required. 
11.	Wait for the generate process to finish.  <b>NOTE:</b> The <b>Generate</b> button will gray out and become inactive.
12.	You have successfully completed the <i>Generating the Grant Award</i> topic.  You have learned how to: - Generate a grant award <b>End of Procedure.</b>

## 2.2 Updating the Project Tree

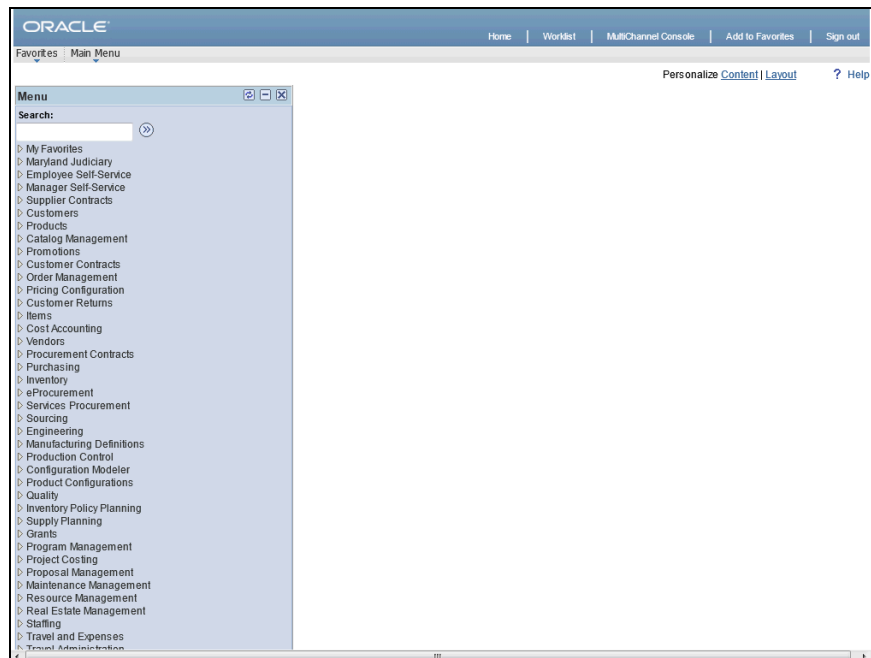
Project Security requires that the project get added to the Project tree for the business unit prior to doing any updates to the project, activity or budget information.

After completing this topic, you will be able to:



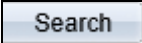







- Update the project tree.

### Procedure

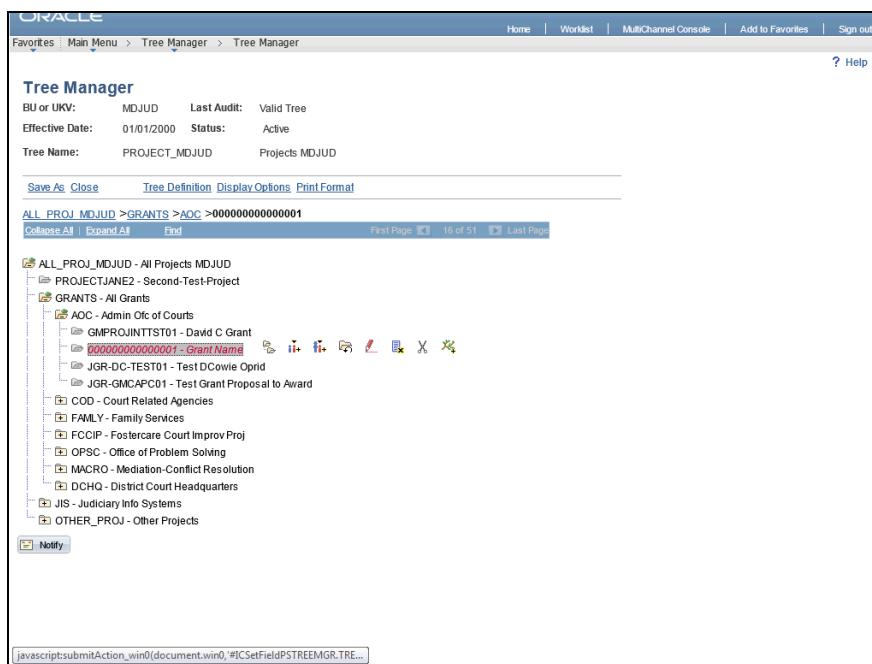
In this topic, you will learn how to add a child node to update the project tree.






Step	Action
1.	Begin by navigating to the <b>Tree Manager</b> page.  Click the <b>Scroll Bar</b> and scroll down the page.
2.	Click the <b>Tree Manager</b> link. 
3.	Click the <b>Tree Manager</b> link. 
4.	The <b>Tree Manager</b> search page displays.  Click the <b>Search</b> button. 
5.	Click the <b>PROJECT_MDJUD</b> link. 
6.	The <b>Tree Manager</b> page displays.  A project tree is an example of one of several types of trees in GEARS. A project tree is a dynamic detail tree, which is one kind of node-oriented tree. It consists of nodes and dynamic detail values for summary project and the detail projects as child nodes.  Each project established in the Grants application must be added to the Grants project tree before updating project and activity information.
7.	Click the <b>Expand Node</b> button for <b>GRANTS</b> . 
8.	Click the <b>Expand Node</b> button for <b>AOC</b> . 
9.	A Child Node is one that rolls up to a higher level node.  Click the <b>Insert Child Node</b> button. 
10.	The <b>Insert Child Node</b> page displays.  Click the <b>Look up Tree Node (Alt+5)</b> button. 
11.	The <b>Look Up Tree Node</b> page displays.  Click the value for the previously created grant award project. For this example, click <b>0000000000000001</b> link. 
12.	Click the <b>Add</b> button. 





Step	Action
13.	Click the <b>Save</b> link. 
14.	You have successfully completed the <i>Updating the Project Tree</i> topic.  You have learned to: - update the project tree by adding a child node <b>End of Procedure.</b>

### 2.3 Updating the Award Budget

The final step to prepare an award for processing is to establish the award budget and submit it to Commitment Control. When you run the Generate Award process, the system populates the **Budget Detail** page in the GEARS Projects module with summarized budget information. At this point, you still need to assign required ChartFields to the individual budget journals, and make any additions or modifications prior to finalization of the budget. Only after the budget is finalized can you apply transactions against it.

After completing this topic, you will be able to:




- Update the award budget finalized in Commitment Control

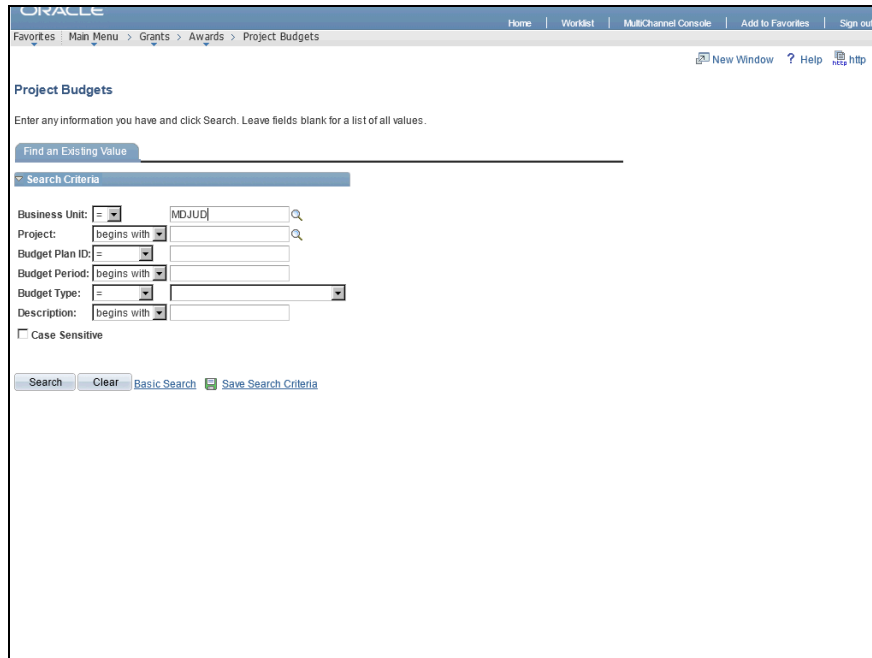
#### Procedure

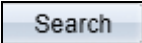

The final step to prepare an award for processing is to establish the award budget.



In this topic, you will enter budget details to establish the grant project budget.

Step	Action
1.	Navigate to the <b>Project Budgets</b> Search page.  Click the <b>Grants</b> link. 
2.	Click the <b>Awards</b> link. 
3.	Click the <b>Project Budgets</b> link. 



Step	Action
4.	The <b>Project Budgets</b> search page displays.  Click the <b>Search</b> button. 
5.	Click the <b>AOCPROJECT#</b> link. If the project you want is not displayed, the project may not exist on the project tree or the UserID does not have security to the tree node containing the project. 



# Training Guide

## GR210 Managing Grant Awards



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Grants > Awards > Project Budgets

New Window ? Help Personalize Page http

### Budget Detail

Project: AOCPROJECT# Grant Name

Budget Period: 1 Begin Date: 07/01/2012 End Date: 06/30/2013 [Finalize](#) [Process Monitor](#)

#### Project Budget Summary

Cost Share Direct: \$0.00 Currency: USD Total Budget: \$110,000.00

Sponsor Budget: \$110,000.00

Security Status: None

#### Budget Amounts for Period

General | Project Detail | General Ledger Detail | Commitment Control Detail | Grants Detail

Program Cost Account	Fund Code	Account	Program	Department	Appropriation Number	Appropriation Year	Activity	Analysis Type	Source Type	Category	Subcategory
00006	0005	0872	G08A	0600101	A0006	AY2013	GRANT	BUD			
00006	0005	0872	G08A	0600101	A0006	AY2013	GRANT	BUD			

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

Step	Action
6.	<p>The <b>Budget Detail</b> page displays. The one shown has already been finalized. The rows will be open for continued editing until the budget row has been finalized.</p> <p>Use the <b>Budget Detail</b> page to enter budget amounts that are associated with a particular budget plan.</p>

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Grants > Awards > Project Budgets

New Window ? Help Personalize Page http

### Budget Detail

Project: AOCPROJECT# Grant Name

Budget Period: 1 Begin Date: 07/01/2012 End Date: 06/30/2013 [Finalize](#) [Process Monitor](#)

#### Project Budget Summary

Cost Share Direct: \$0.00 Currency: USD Total Budget: \$110,000.00

Sponsor Budget: \$110,000.00

Security Status: None

#### Budget Amounts for Period

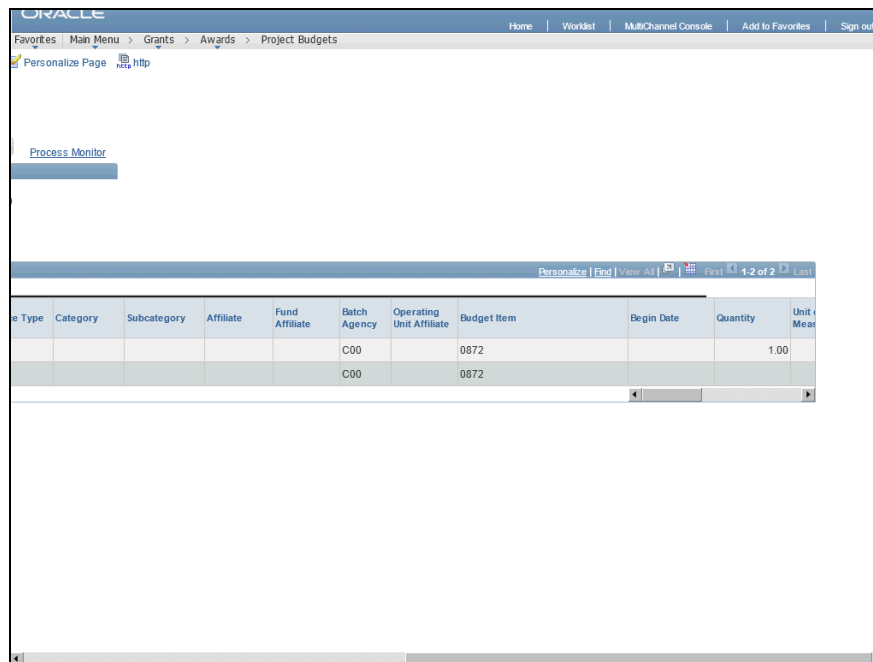
General | Project Detail | General Ledger Detail | Commitment Control Detail | Grants Detail

Program Cost Account	Fund Code	Account	Program	Department	Appropriation Number	Appropriation Year	Activity	Analysis Type	Source Type	Category	Subcategory
00006	0005	0872	G08A	0600101	A0006	AY2013	GRANT	BUD			
00006	0005	0872	G08A	0600101	A0006	AY2013	GRANT	BUD			

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)



Step	Action
7.	Move the scrollbar to the right.



Step	Action
8.	Move the scrollbar to the right.



# Training Guide

## GR210 Managing Grant Awards



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Grants > Awards > Project Budgets

Personalize Page

Process Monitor

Personalize | Find | View Add First 1-2 of 2 Last

Type	Category	Subcategory	Affiliate	Fund Affiliate	Batch Agency	Operating Unit Affiliate	Budget Item	Amount	Currency
					C00		0872	100,000.00	USD
					C00		0872	10,000.00	USD

Step	Action
9.	Click the <b>Add a new row at row 2 (Alt+7)</b> button. 

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Grants > Awards > Project Budgets

New Window ? Help Personalize Page

**Budget Detail**

Project: AOCPROJECT# Grant Name

Budget Period: 1 Begin Date: 07/01/2012 End Date: 06/30/2013 Finalize Process Monitor

**Project Budget Summary**

Cost Share Direct: \$0.00 Currency: USD Total Budget: \$110,000.00

Sponsor Budget: \$110,000.00

Security Status: None

**Budget Amounts for Period**

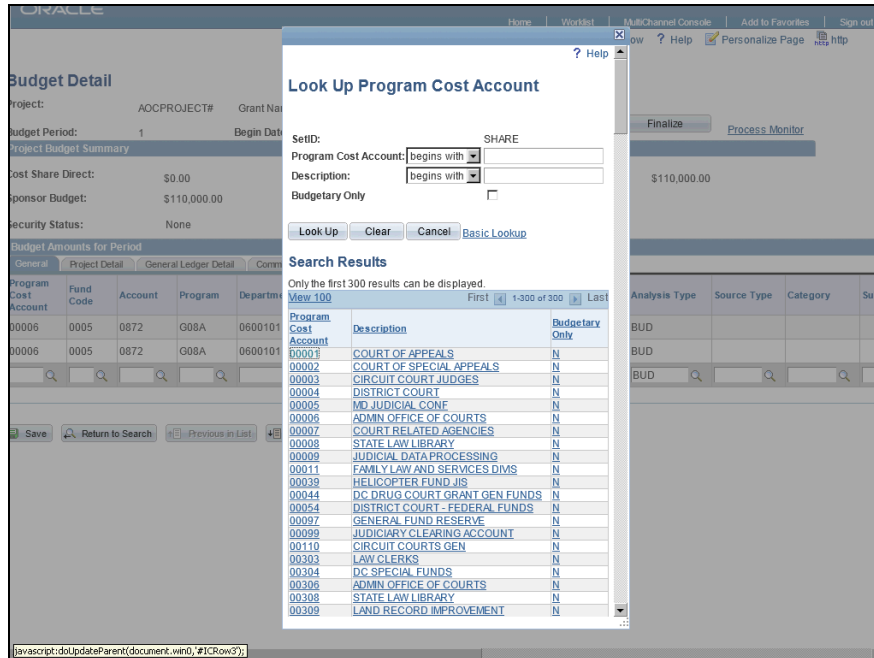
General Project Detail General Ledger Detail Commitment Control Detail Grants Detail

Program Cost Account	Fund Code	Account	Program	Department	Appropriation Number	Appropriation Year	Activity	Analysis Type	Source Type	Category	Sub
00006	0005	0872	G08A	0600101	A0006	AY2013	GRANT	BUD			
00006	0005	0872	G08A	0600101	A0006	AY2013	GRANT	BUD			

Save Return to Search Previous in List Next in List Notify



Step	Action
10.	Click the <b>Look up Program Cost Account</b> button. 



**Look Up Program Cost Account**

SetID: SHARE

Program Cost Account: begins with

Description: begins with



Budgetary Only ☐

Look Up Clear Cancel Basic Lookup

**Search Results**

Only the first 300 results can be displayed.

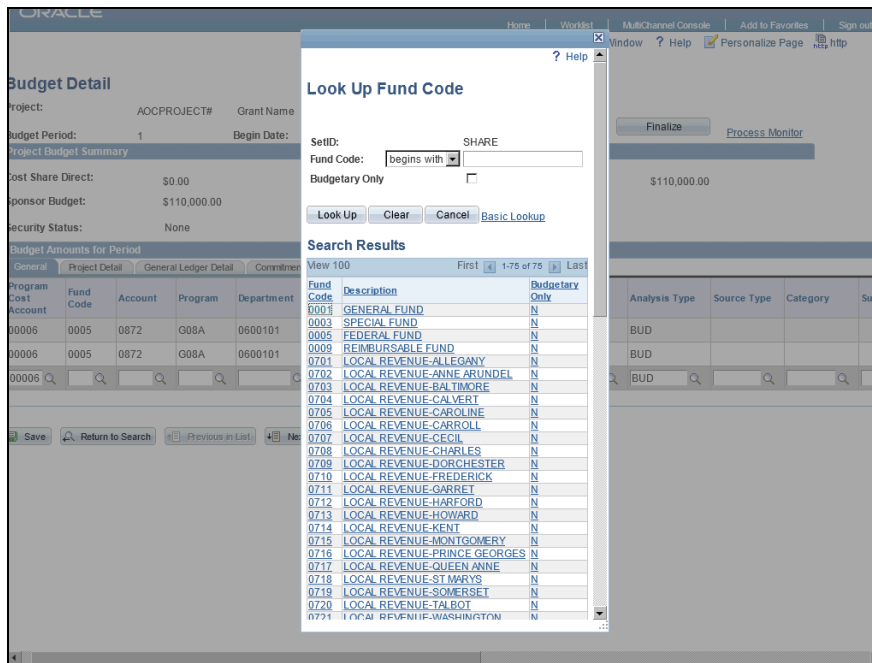
Program Cost Account	Description	Budgetary Only
00001	COURT OF APPEALS	N
00002	COURT OF SPECIAL APPEALS	N
00003	CIRCUIT COURT JUDGES	N
00004	DISTRICT COURT	N
00005	MD JUDICIAL CONF	N
00006	ADMIN OFFICE OF COURTS	N
00007	COURT RELATED AGENCIES	N
00008	STATE LAW LIBRARY	N
00009	JUDICIAL DATA PROCESSING	N
00011	FAMILY LAW AND SERVICES DIVS	N
00039	HELICOPTER FUND JIS	N
00044	DC DRUG COURT GRANT GEN FUNDS	N
00054	DISTRICT COURT - FEDERAL FUNDS	N
00097	GENERAL FUND RESERVE	N
00099	JUDICIARY CLEARING ACCOUNT	N
00110	CIRCUIT COURTS GEN	N
00303	LAW CLERKS	N
00304	DC SPECIAL FUNDS	N
00306	ADMIN OFFICE OF COURTS	N
00308	STATE LAW LIBRARY	N
00309	LAND RECORD IMPROVEMENT	N


Step	Action
11.	The <b>Look Up Program Cost Account</b> page displays. Use the PCA associated with the grant.  Click the <b>00006</b> link. 
12.	Click the <b>Look up Fund Code</b> button. 



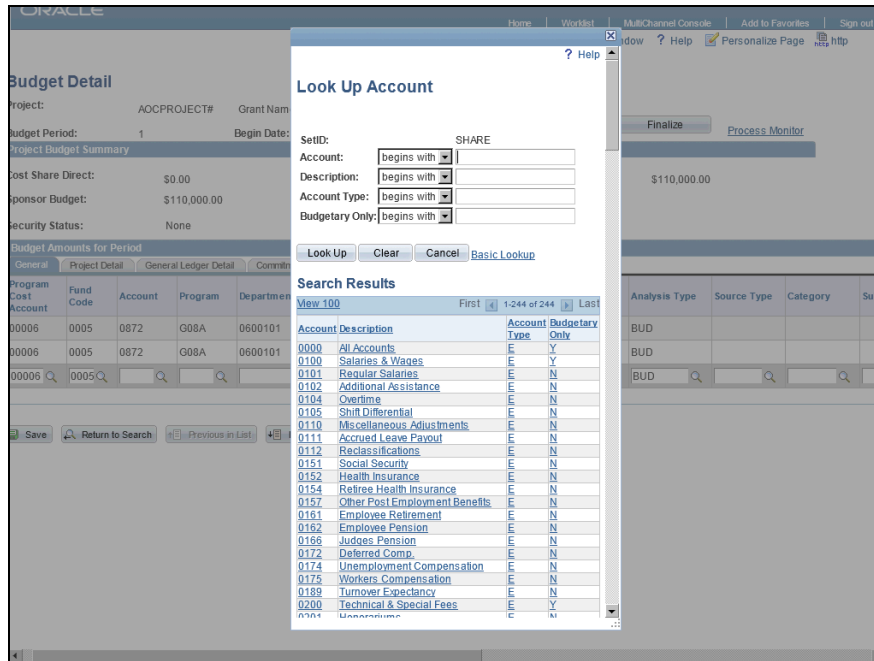
# Training Guide

## GR210 Managing Grant Awards



Step	Action
13.	<p>The <b>Look Up Fund Code</b> page displays. Use the appropriate fund code for the grant.</p> <p>For this example, click the <b>0005</b> link.</p> <p><b>0005</b></p>
14.	<p>Click the <b>Look up Account</b> button.</p> <p></p>





**Budget Detail**

Project: AOCPROJECT# Grant Name

Budget Period: 1 Begin Date:

Project Budget Summary

Cost Share Direct: \$0.00

Sponsor Budget: \$110,000.00

Security Status: None

Budget Amounts for Period

General Project Detail General Ledger Detail Commitment

Program Cost Account Fund Code Account Program Department

00006 0005 0872 G08A 0600101

00006 0005 0872 G08A 0600101

00006 0005 0872 G08A 0600101

Save Return to Search Previous in List

**Look Up Account**

SetID: SHARE

Account: begins with

Description: begins with

Account Type: begins with

Budgetary Only: begins with

Look Up Clear Cancel Basic Lookup

**Search Results**

View 100 First 1-244 of 244 Last

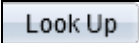
Account	Description	Account Type	Budgetary Only
0000	All Accounts	E	Y
0100	Salaries & Wages	E	Y
0101	Regular Salaries	E	N
0102	Additional Assistance	E	N
0104	Overtime	E	N
0105	Shift Differential	E	N
0110	Miscellaneous Adjustments	E	N
0111	Accrued Leave Payout	E	N
0112	Reclassifications	E	N
0151	Social Security	E	N
0152	Health Insurance	E	N
0154	Retiree Health Insurance	E	N
0157	Other Post Employment Benefits	E	N
0161	Employee Retirement	E	N
0162	Employee Pension	E	N
0166	Judges Pension	E	N
0172	Deferred Comp.	E	N
0174	Unemployment Compensation	E	N
0175	Workers Compensation	E	N
0189	Turnover Expectancy	E	N
0200	Technical & Special Fees	E	Y
0204	Unemployment	E	N

Analysis Type Source Type Category Subcategory

BUD

BUD

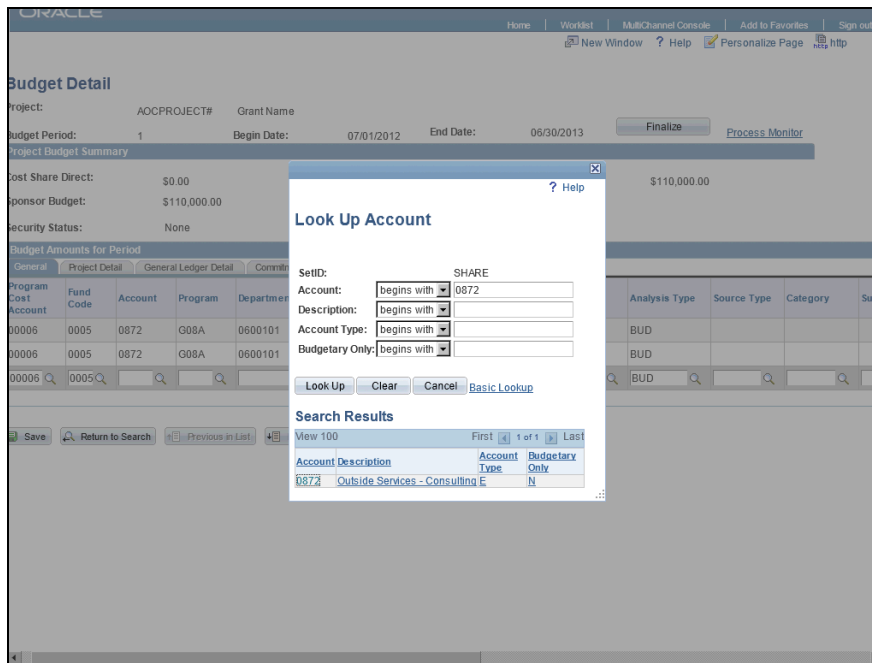
BUD



Step	Action
15.	<p>The <b>Look Up</b> Account page displays.</p> <p>Enter the desired information into the <b>Account</b> field. For example enter "<b>0000</b>". To simplify budget entry for grants, the All Accounts value will be used.</p>
16.	<p>Click the <b>Look Up</b> button.</p> <p></p>



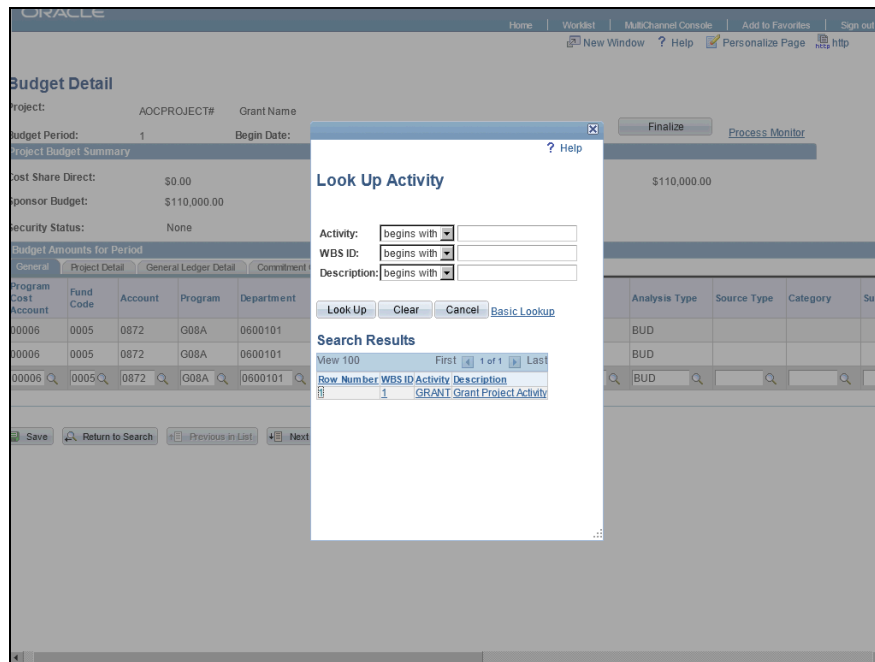
# Training Guide

## GR210 Managing Grant Awards

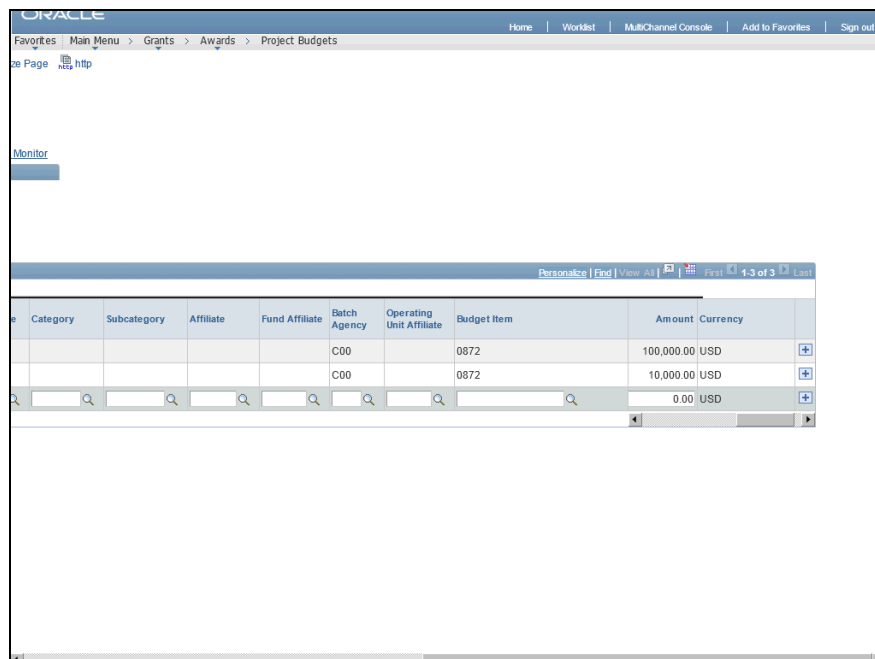


Step	Action
17.	Click the <b>0872</b> link. 
18.	Enter the desired information into the <b>Program</b> field. Enter " <b>G08A</b> ".
19.	Budgets are not being created at the department level. However, for this example, enter the desired information into the <b>Department</b> field. Enter " <b>0600101</b> ".
20.	Enter the desired information into the <b>Appropriation Number</b> field. For this example, enter " <b>A0006</b> ".
21.	Enter the desired information into the <b>Appropriation Year</b> field. For this example, enter " <b>AY2013</b> ".
22.	Click the <b>Look up Activity (Alt+5)</b> button. 

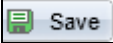







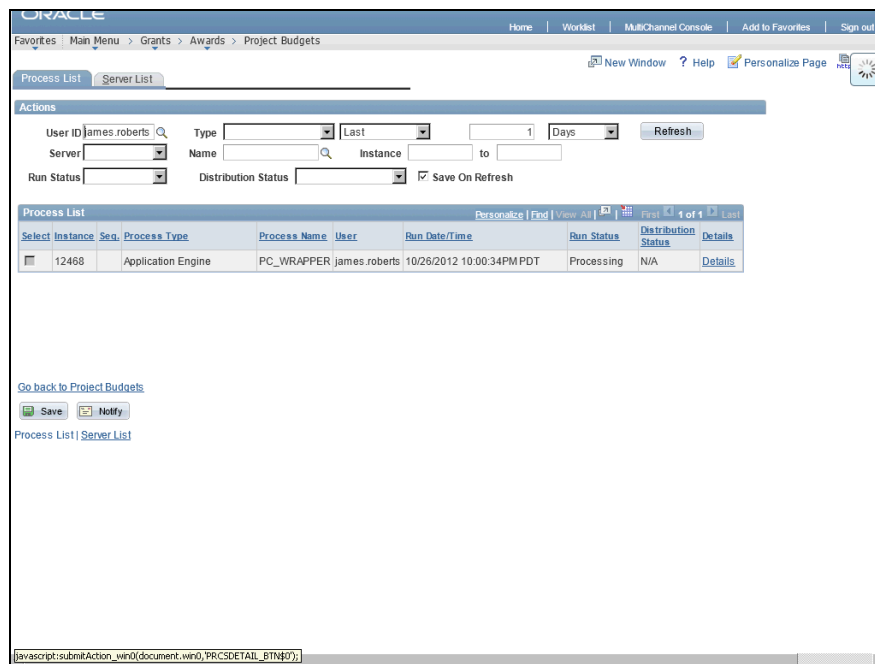
Step	Action
23.	<p>The <b>Look Up Activity</b> page displays.</p> <p>Click the <b>Activity GRANT</b> link.</p> <p><u>GRANT</u></p>
24.	Move the scrollbar to the right.

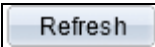








Step	Action
25.	Enter the desired information into the <b>Batch Agency</b> field. For example enter a valid value e.g. " <b>C25</b> ".
26.	Enter the desired information into the <b>Budget Item</b> field. Enter a valid value e.g. " <b>0000</b> " for all accounts.
27.	Enter the desired information into the <b>Amount</b> field. Enter the grant amount e.g. " <b>10000</b> ".
28.	Move the scrollbar back to the left.
29.	Click the <b>Save</b> button. 
30.	Click the <b>Finalize</b> button after making changes to an active budget period. The system finalizes the plan by picking up the rows only for a budget period and not the entire plan, as in Project Costing. Security to run the <b>Finalize</b> process may be required.  Click the <b>Finalize</b> button. 
31.	A confirmation message displays.  The budget finalization process updates commitment control with the grant project budget.  Click the <b>OK</b> button. 
32.	Click the <b>Process Monitor</b> link. 



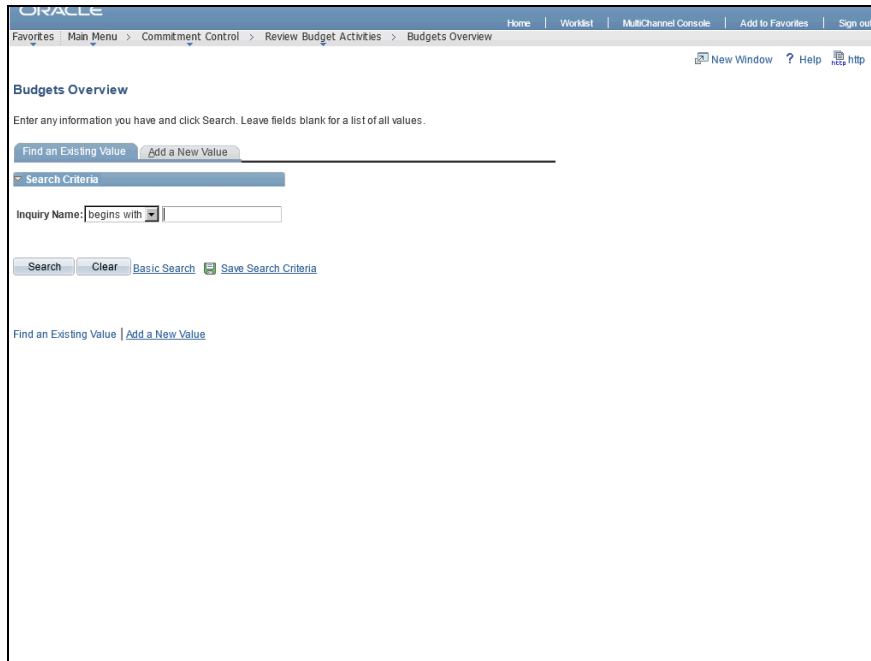


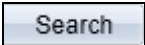
Step	Action
33.	<p>The <b>Process Monitor - Process List</b> page displays.</p> <p>The current status of the process is "Processing". The process is finished when the Run Status is "Success".</p>
34.	<p>If needed, click on the <b>Refresh</b> button periodically until the Run Status is "Success".</p> <p></p>
35.	<p>After submitting the grant budget to Commitment control you can click the <b>Home</b> link to navigate to Commitment Control.</p> <p></p>
36.	<p>Navigate to the <b>Budget Overview</b> inquiry page.</p> <p>Click the <b>Commitment Control</b> link.</p> <p></p>
37.	<p>Click the <b>Review Budget Activities</b> link.</p> <p></p>
38.	<p>Click the <b>Budgets Overview</b> link.</p> <p></p>



# Training Guide

## GR210 Managing Grant Awards



Step	Action
39.	<p>The <b>Budgets Overview</b> search page displays. If this is the first time this functionality is being used, the <b>Add a New Value</b> will be used to setup the <b>Inquiry</b> value used in the overview.</p> <p>Click the <b>Search</b> button.</p> 



ORACLE  
Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window ? Help http

### Budgets Overview

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

**Search Criteria**

Inquiry Name: begins with

Search Clear Basic Search Save Search Criteria

### Search Results

View All First 1-2 of 2 Last

Inquiry Name	Description
PROGRAM	Program
PROJECT	Project

Find an Existing Value | Add a New Value

[javascript:submitAction\_wip0(document.wip0,'#1CRow1')]

Step	Action
40.	Click the <b>PROJECT</b> link. <b>PROJECT</b>

ORACLE  
Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Inquiry: PROJECT Description: Project

Amount Criteria Search Clear Reset

**Budget Type**

\*Business Unit: MDJUD Ledger Group/Set: Ledger Group Ledger Group: PROJ\_GRNT

☐ View Stat Code Budgets Project/Grant Ledger Group

☐ Display Chart

**Time Span**

\*Type of Calendar: Detail Budget Period

**Budget Criteria**

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	PROJ_GRNT	BY	2013	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**ChartField Criteria**

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	1		Update/Add
Batch Agy	%	%	1		Update/Add
PCA	%	%	1		Update/Add
Fund	%	%	1		Update/Add
Approp Number	%	%	1		Update/Add
Program	%	%	1		Update/Add
Approp Yr	%	%	1		Update/Add
PC Bus Unit	%	%	1		Update/Add
Project	%	%	1		Update/Add
Activity	%	%	1		Update/Add

**Budget Status**


☒ Open

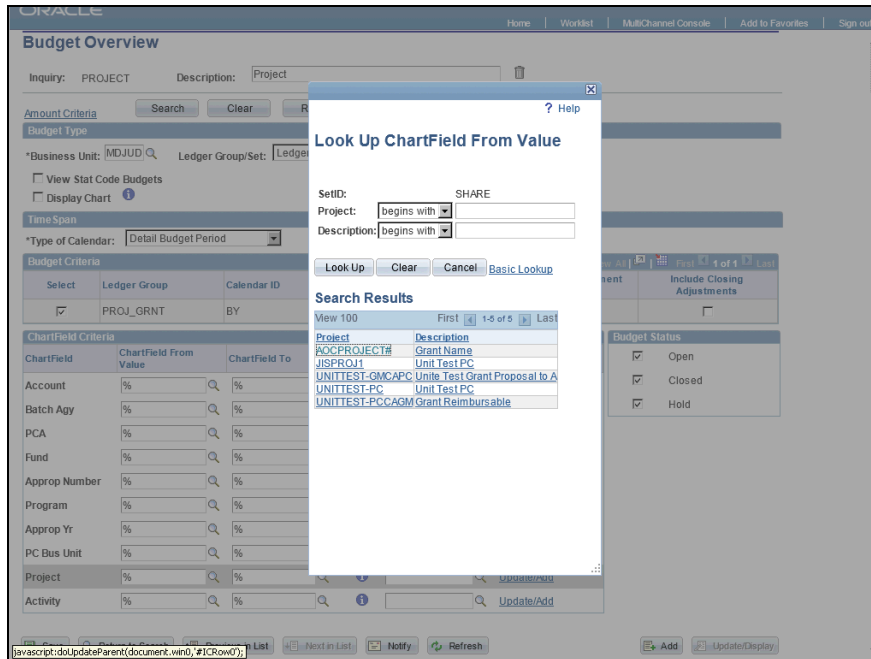
☒ Closed

☒ Hold

[javascript:pAction\_wip0(document.wip0,'XK\_INQ\_LD\_OF\_CHARTFIELD\_VALU...'] Notify Refresh Add Update/Display



Step	Action
41.	<p>The <b>Budgets Overview</b> page displays. Commitment control access for the UserID may be needed.</p> <p>Click the <b>Look up ChartField From Value</b> button for the Project Chartfield.</p> 

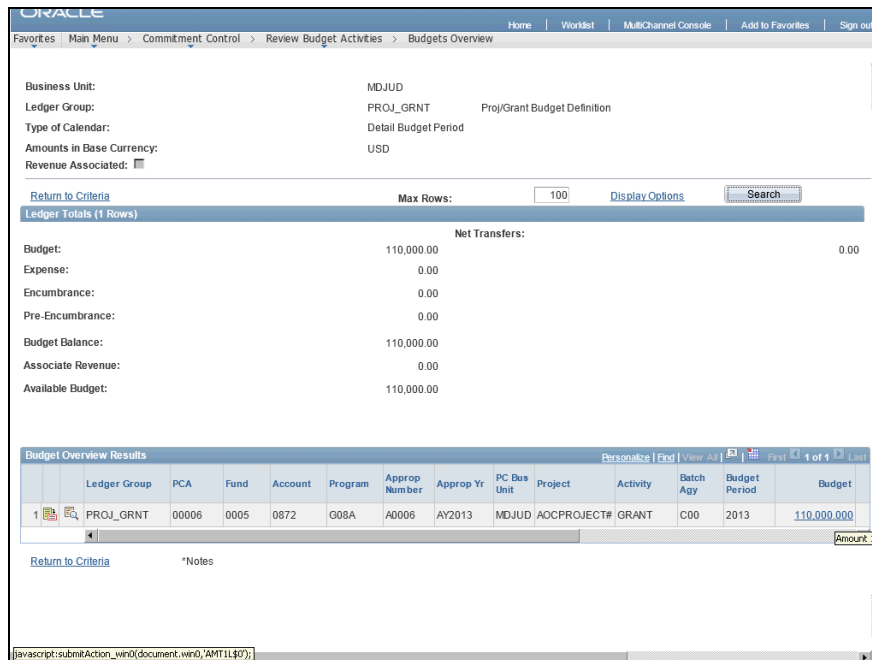


The screenshot shows the Oracle Budget Overview page. The 'Look Up ChartField From Value' dialog box is open, displaying search results for the Project Chartfield. The dialog box has fields for SetID (SHARE), Project (begins with), and Description (begins with). The search results table lists the following projects:

Project	Description
AOCPROJECT#	Grant Name
JISPROJ1	Unit Test PC
UNITTEST-GMCAPC	Unit Test Grant Proposal to A
UNITTEST-PC	Unit Test PC
UNITTEST-PCCAGM	Grant Reimbursable

Step	Action
42.	<p>The <b>Look Up ChartField From Value</b> page displays.</p> <p>Click the <b>AOCPROJECT#</b> link to find information about that project.</p> <p><b>AOCPROJECT#</b></p>
43.	<p>Click the <b>Search</b> button.</p> <p><b>Search</b></p>





Business Unit: MDJUD  
 Ledger Group: PROJ\_GRNT Proj/Grant Budget Definition  
 Type of Calendar: Detail Budget Period  
 Amounts in Base Currency: USD  
 Revenue Associated: ☐

Return to Criteria Max Rows: 100 Display Options Search

Ledger Totals (1 Rows)

Budget: 110,000.00  
 Expense: 0.00  
 Encumbrance: 0.00  
 Pre-Encumbrance: 0.00  
 Budget Balance: 110,000.00  
 Associate Revenue: 0.00  
 Available Budget: 110,000.00

Net Transfers: 0.00

Budget Overview Results

	Ledger Group	PCA	Fund	Account	Program	Approp Number	Approp Yr	PC Bas Unit	Project	Activity	Batch Agy	Budget Period	Budget
1	PROJ_GRNT	00006	0005	0872	G08A	A0006	AY2013	MDJUD	AOCPROJECT#	GRANT	C00	2013	110,000.000

Return to Criteria \*Notes

[javascript:submitAction\_wip0(document.wip0,'AMT1140?')]

Step	Action
44.	Click the <b>110,000.000</b> link in the Budget Overview Results table. <b>110,000.000</b>
45.	The <b>Activity Log</b> displays.  Use this page to verify your Project's budget and information.
46.	You have successfully completed the <i>Updating Award Budget</i> topic.  You have learned how to: - Update the award budget with multiple line items <b>End of Procedure.</b>

## Lesson 3: Updating the Grant Project & Project Activities

### Lesson Overview

After the award generation process is complete, you also can update and maintain project activity and award profile information. Most of the project profile and activity information is populated during the award generation process.

All transactions associated with an award must be linked to a project and an activity to process the transactions against the award funding. Therefore, you must associate an activity with your award projects. When you run the generate award process, an activity is automatically created. During post award processing, you need to specify any additional activity information that was not already populated when the award generation process was run.

### Lesson Objectives

In this lesson, you will learn how to:



- Update a grant project
- Update grant project activities

### 3.1 Updating a Grant Project

After completing this topic, you will be able to:



- Update a grant project

.

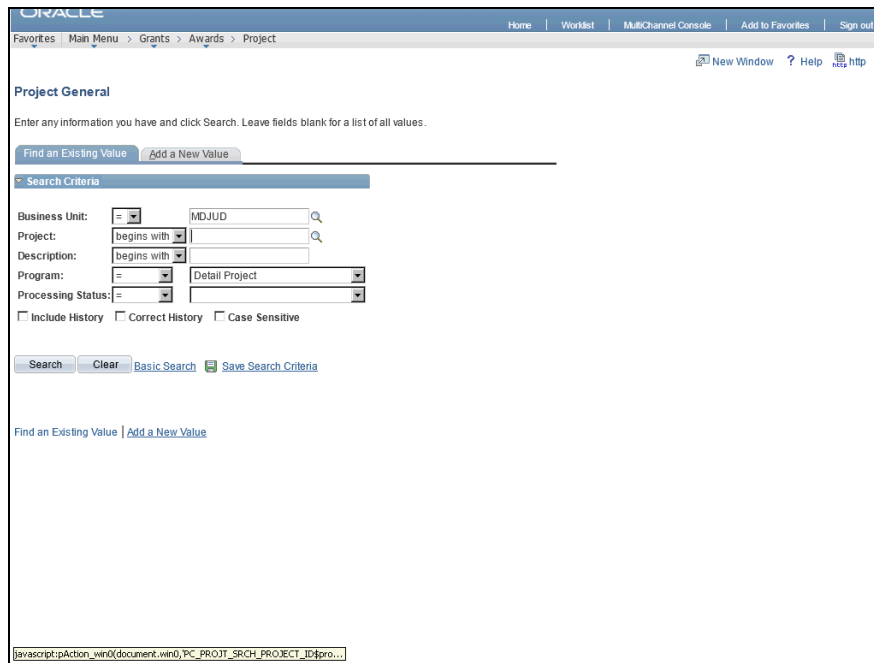
#### Procedure

After the award generation process is complete, you can update and maintain project activity and award profile information. Most of the project profile and activity information is populated during the award generation process.

In this topic, the Grant Project and Grant Project Activity information will be updated. Project Security requires that the project get added to the Project tree for the business unit prior to doing any updates.

Step	Action
1.	Click the <b>Grants</b> link. 
2.	In the <b>Awards</b> pagelet, click the <b>Project</b> link. 





Project General

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: = MDJUD

Project: begins with

Description: begins with

Program: = Detail Project


Processing Status: =

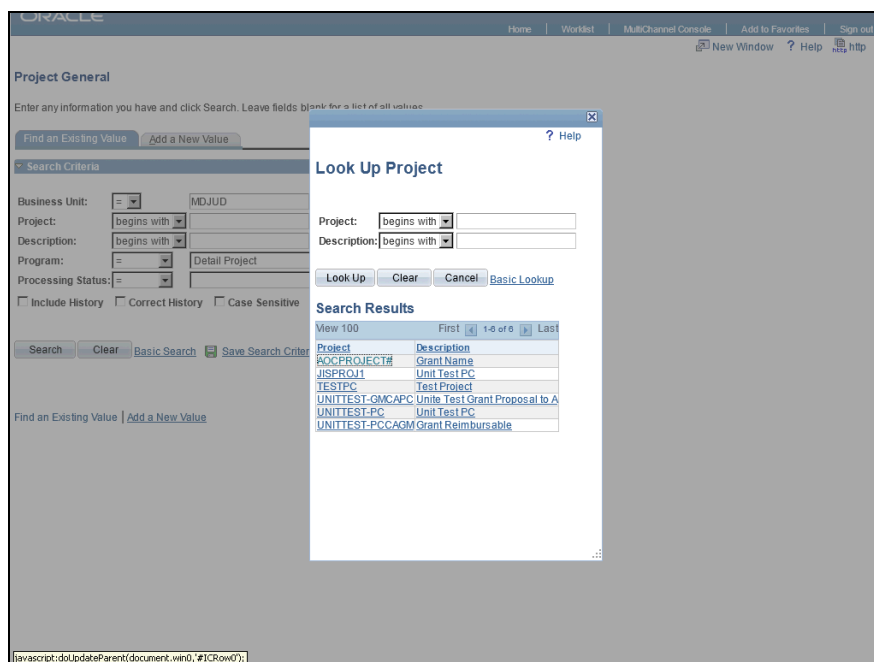
☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

javascript:Action\_wizard(document.win0,PC\_PROJT\_SRCH\_PROJECT\_ID#pro...

Step	Action
3.	<p>The <b>Project General</b> search page displays.</p> <p>Click the <b>Look up Project (Alt+5)</b> button.</p> 



Project General

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: = MDJUD

Project: begins with

Description: begins with

Program: = Detail Project

Processing Status: =

☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

javascript:doUpdateParent(document.win0, #1CRow0);

**Look Up Project**

Project: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

**Search Results**

View 100 First 1-4 of 6 Last

Project	Description
AOCPROJECT#	Grant Name
JISPROJ1	Unit Test PC
TESTPC	Test Project
UNITTEST-QMCAPC	Unit Test Grant Proposal to A
UNITTEST-PC	Unit Test PC
UNITTEST-PCCGM	Grant Reimbursable



# Training Guide

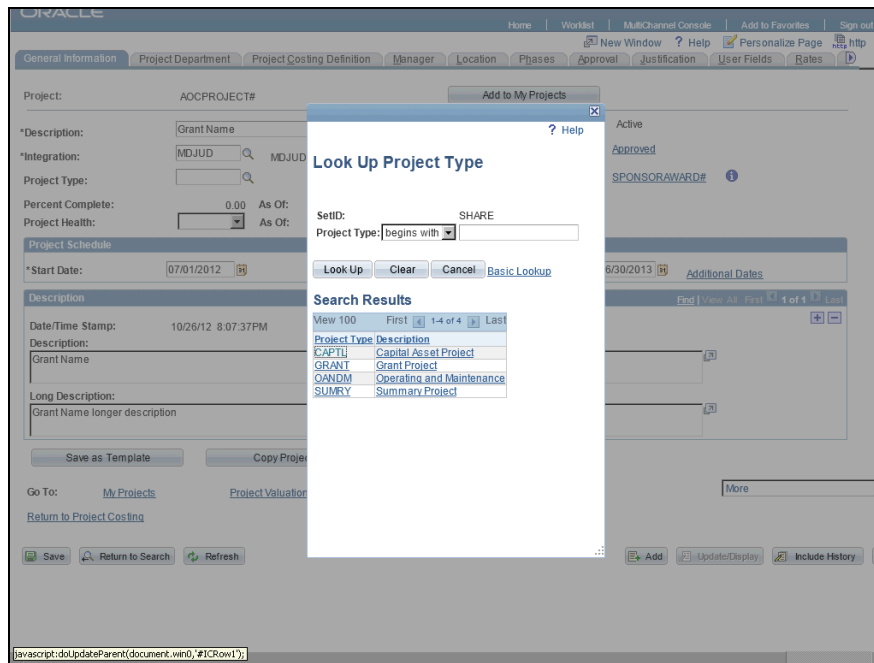
## GR210 Managing Grant Awards



Step	Action
4.	<p>The <b>Look Up Project</b> page displays.</p> <p>Select the the project previously created and added to the project tree. For this example, click <b>AOCPROJECT#</b> project link.</p> <p><b>AOCPROJECT#</b></p>
5.	<p>Click the <b>Search</b> button.</p> <p><b>Search</b></p>

Step	Action
6.	<p>The <b>Project - General Information</b> page displays.</p> <p>Click the <b>Look up Project Type (Alt+5)</b> button.</p> <p></p>



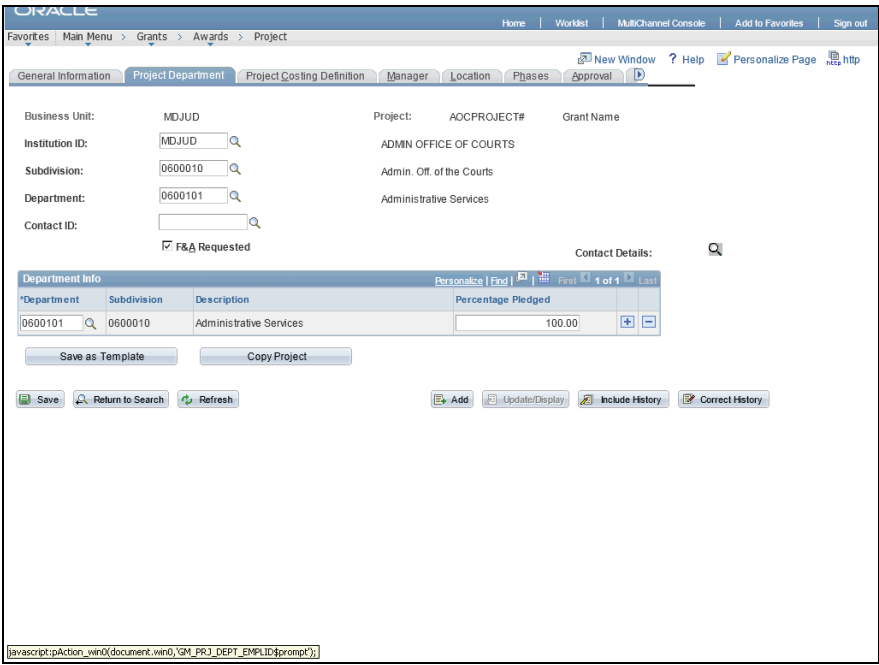


Step	Action
7.	<p>The <b>Look Up Project Type</b> page displays.</p> <p>Click the <b>GRANT</b> project type link.</p> <p><b>GRANT</b></p>
8.	<p>Click the <b>Project Health</b> list.</p> <p><b>Project Health</b></p>
9.	<p>Click the <b>Good</b> list item.</p> <p><b>Good</b></p>
10.	<p>Click the <b>Project Department</b> tab.</p> <p><b>Project Department</b></p>



# Training Guide

## GR210 Managing Grant Awards



Business Unit: MDJUD Project: AOCPROJECT# Grant Name

Institution ID: MDJUD ADMIN OFFICE OF COURTS

Subdivision: 0600010 Admin. Off. of the Courts

Department: 0600101 Administrative Services

Contact ID:


Contact Details:

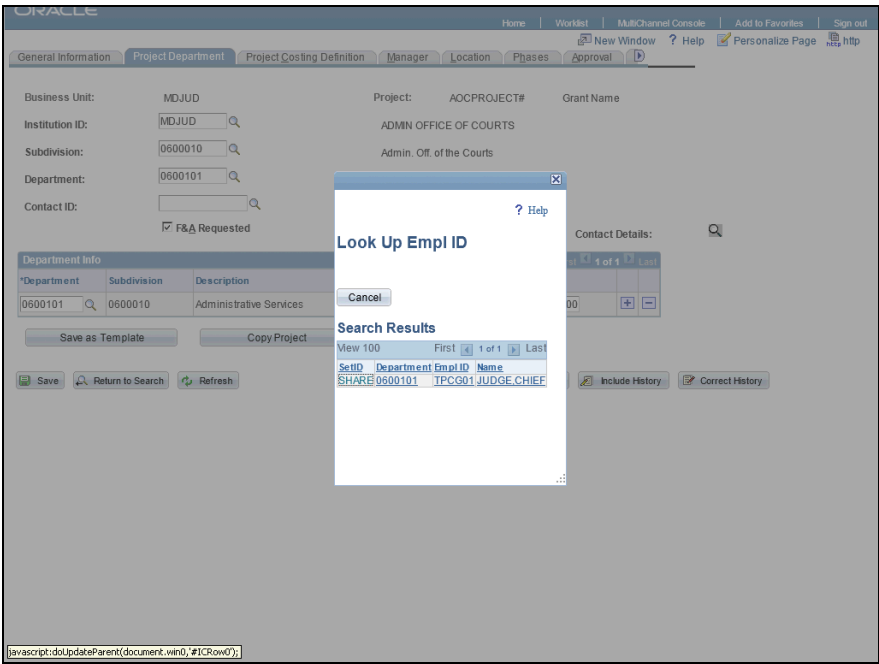
*Department	Subdivision	Description	Percentage Pledged
0600101	0600010	Administrative Services	100.00

Save as Template Copy Project

Save Return to Search Refresh Add Update/Display Include History Correct History

javascript: pAction\_win(document.win0,'GM\_P01\_DEPT\_EMPID',prompt);

Step	Action
11.	<p>The <b>Project Department</b> tab displays. These values should have defaulted from the proposal when the grant award was generated.</p> <p>Click the <b>Look up Contact ID (Alt+5)</b> button to assign the department contact.</p> 



Business Unit: MDJUD Project: AOCPROJECT# Grant Name

Institution ID: MDJUD ADMIN OFFICE OF COURTS

Subdivision: 0600010 Admin. Off. of the Courts

Department: 0600101 Administrative Services

Contact ID:

Contact Details:

*Department	Subdivision	Description	Percentage Pledged
0600101	0600010	Administrative Services	100.00

Save as Template Copy Project

Save Return to Search Refresh Add Update/Display Include History Correct History

javascript: doUpdateParent(document.win0,'#1Row0');

**Look Up Empl ID**

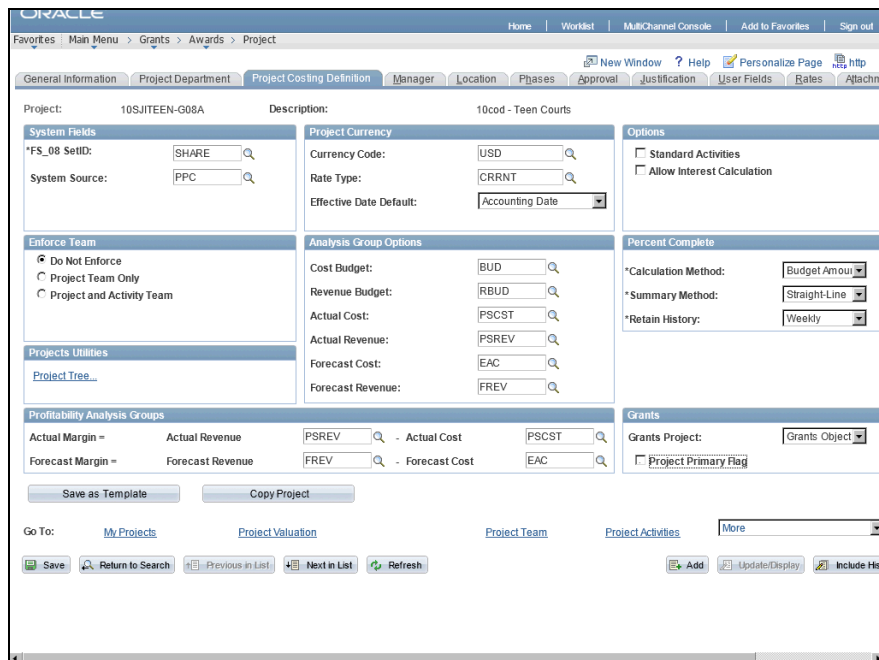
Cancel

Search Results

SetID	Department	Empl ID	Name
SHARE	0600101	TPCG01	JUDGE CHIEF



Step	Action
12.	<p>The <b>Look Up Empl ID</b> page displays.</p> <p>Select the appropriate <b>Empl ID</b> link for the employee/grantee. For this example, click <b>TPCG01</b> link.</p> <p><b>TPCG01</b></p>
13.	<p>Click the <b>F&amp;A Requested</b> option to deselect it.</p> <p><input checked="" type="checkbox"/> <b>F&amp;A Requested</b></p>
14.	Click on the <b>Project Costing Definition</b> tab.



The screenshot shows the Oracle Project Costing Definition tab. The top navigation bar includes tabs like General Information, Project Department, Project Costing Definition (selected), Manager, Location, Phases, Approval, Justification, User Fields, Rates, and Attachments. The main content area is divided into several sections:

- System Fields:** Includes \*FS\_08 SetID (SHARE) and System Source (PPC).
- Project Currency:** Includes Currency Code (USD), Rate Type (CRRNT), and Effective Date Default (Accounting Date).
- Options:** Includes checkboxes for Standard Activities and Allow Interest Calculation.
- Enforce Team:** Includes radio buttons for Do Not Enforce, Project Team Only, and Project and Activity Team.
- Analysis Group Options:** Includes fields for Cost Budget (BUD), Revenue Budget (RBUD), Actual Cost (PSCST), Actual Revenue (PSREV), Forecast Cost (EAC), and Forecast Revenue (FREV).
- Percent Complete:** Includes fields for Calculation Method (Budget Amount), Summary Method (Straight-Line), and Retain History (Weekly).
- Profitability Analysis Groups:** Includes fields for Actual Margin, Actual Revenue, Actual Cost, Forecast Margin, Forecast Revenue, and Forecast Cost.
- Grants:** Includes a Grants Project field and a Project Primary Flag checkbox.

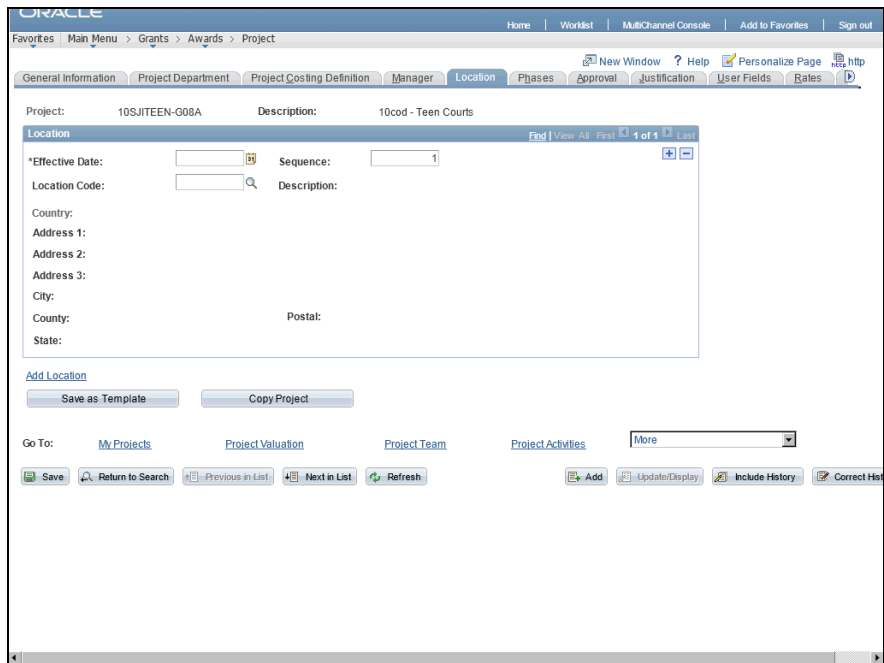
At the bottom, there are buttons for Save as Template, Copy Project, Go To (My Projects, Project Valuation, Project Team, Project Activities, More), and a row of action buttons: Save, Return to Search, Previous in List, Next in List, Refresh, Add, Update/Display, and Include Hst.


Step	Action
15.	<p>The <b>Project Costing Definition</b> tab displays.</p> <p>One project associated with the grant has to be selected as the Primary Project.</p> <p>Click the <b>Project Primary Flag</b> option.</p> <p><input type="checkbox"/> <b>Project Primary Flag</b></p>
16.	<p>Click on the <b>Location</b> tab.</p> <p><b>Location</b></p>



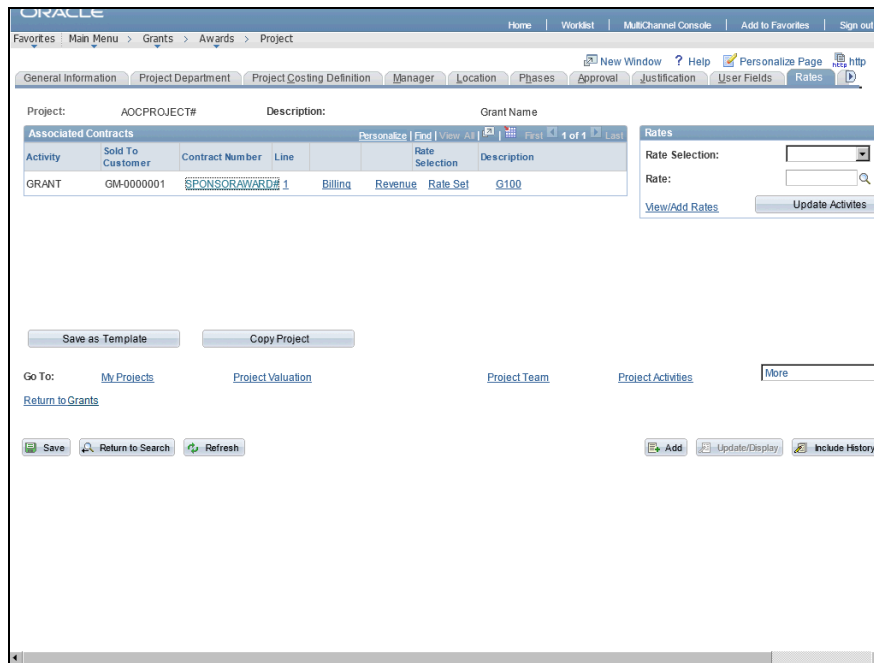
# Training Guide

## GR210 Managing Grant Awards



Step	Action
17.	<p>The <b>Location</b> tab displays.</p> <p>Enter a valid Effective <b>Date</b>. For this example, enter "<b>07/01/2012</b>". The first effective date needs to be the start date for the Grant. If the location changes, additional effective dated locations can be added.</p>
18.	<p>Enter the desired information into the <b>Location</b> field. Enter a valid value. For this example, enter "<b>AOC</b>".</p>
19.	<p>Click the <b>Rates</b> tab to verify that a rate set or rate plan has been associated with the project.</p> 





Oracle GR210 Managing Grant Awards - Rates Tab

Project: AOCPROJECT# Description: Grant Name

Activity	Sold To Customer	Contract Number	Line	Rate Selection	Description
GRANT	GM-0000001	SPONSORAWARD# 1	Billing	Revenue	Rate Set G100

Rate Selection:   
Rate:

View/Add Rates Update Activities

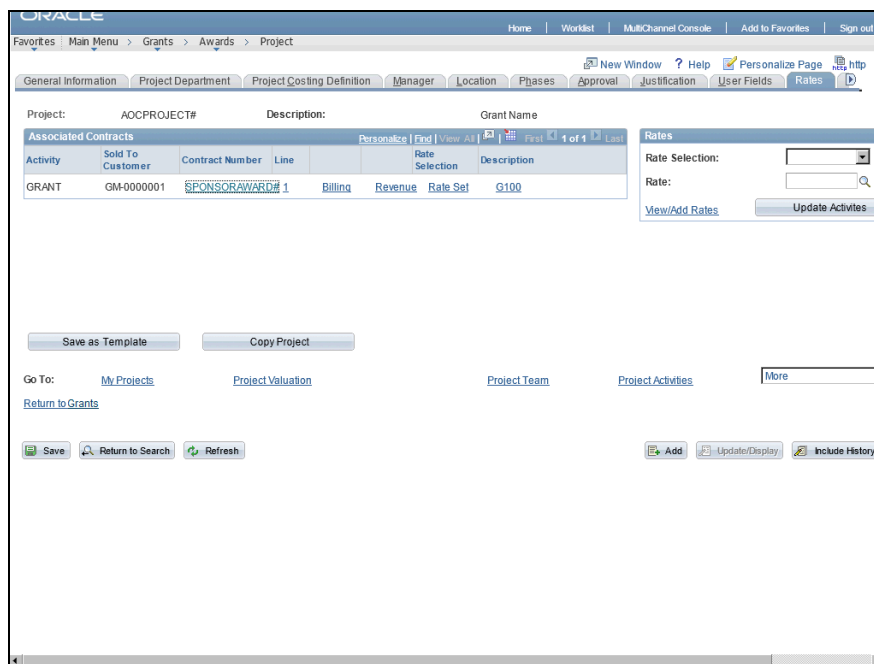
Save as Template Copy Project

Go To: My Projects Project Valuation Project Team Project Activities More

Return to Grants

Save Return to Search Refresh Add Update/Display Include History

Step	Action
20.	<p>The <b>Rates</b> tab displays.</p> <p>To review the rate details regarding the project, click on the values in the <b>Associated Contracts</b> table.</p>



Oracle GR210 Managing Grant Awards - Rates Tab

Project: AOCPROJECT# Description: Grant Name

Activity	Sold To Customer	Contract Number	Line	Rate Selection	Description
GRANT	GM-0000001	SPONSORAWARD# 1	Billing	Revenue	Rate Set G100

Rate Selection:   
Rate:

View/Add Rates Update Activities

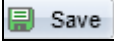
Save as Template Copy Project

Go To: My Projects Project Valuation Project Team Project Activities More

Return to Grants

Save Return to Search Refresh Add Update/Display Include History



Step	Action
21.	Click the <b>Save</b> button. 
22.	You have successfully completed the <i>Updating a Grant Project</i> topic.  You have learned how to: - Review and update grant project information created during award generation <b>End of Procedure.</b>

### 3.2 Updating Grant Project Activities

Activities are the tasks or subcomponents associated with a project. For each project, at least one activity must be defined. There may be times when you need to modify an activity.

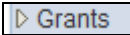

After completing this topic, you will be able to:

- Review and modify the Project Activities.

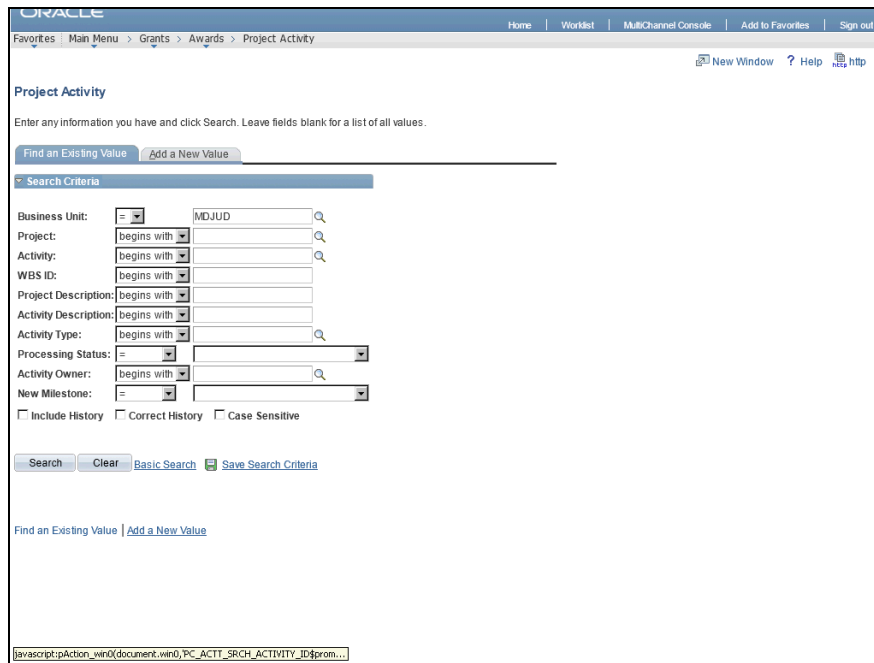
#### Procedure

Activities are the tasks or subcomponents associated with a project. For each project, at least one activity must be defined. There may be times when you need to modify an activity.


In this topic, you will modify the project activity.

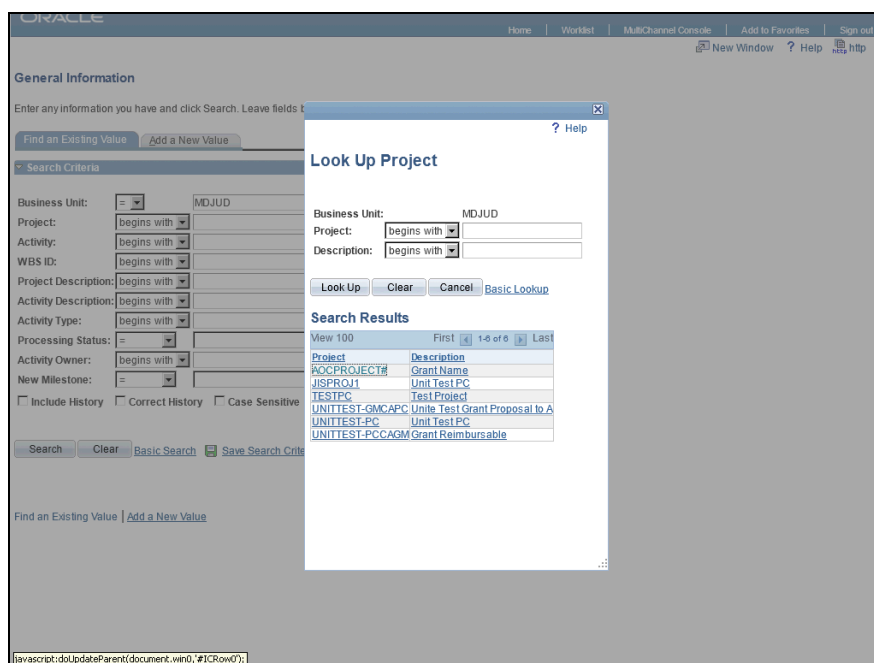
Step	Action
1.	Begin by navigating to the <b>Project Activities</b> page.  Click the <b>Grants</b> link. 
2.	In the <b>Awards</b> pagelet, click the <b>Project Activity</b> link. 






The screenshot shows the 'Project Activity' search page. It includes a navigation bar with 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below the navigation bar, there's a 'Project Activity' section with a search criteria form. The form has fields for 'Business Unit' (set to MDJUD), 'Project', 'Activity', 'WBS ID', 'Project Description', 'Activity Description', 'Activity Type', 'Processing Status', 'Activity Owner', and 'New Milestone'. Each field has a dropdown menu and a search icon. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

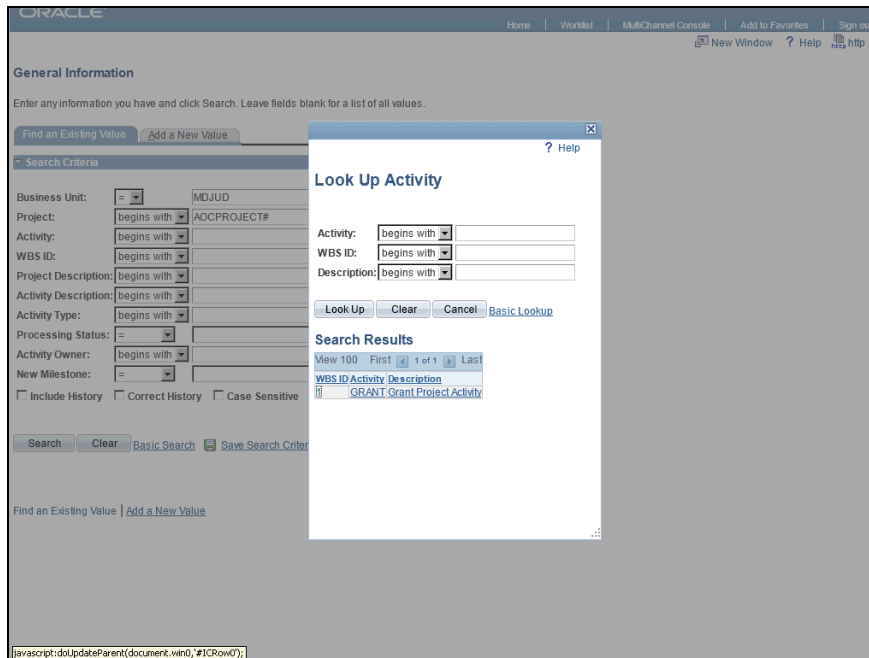
Step	Action
3.	<p>The <b>Project Activity</b> search page displays.</p> <p>Click the <b>Look up Project (Alt+5)</b> button. This lookup may not be necessary if the navigation from the project bring you to the project.</p> 



The screenshot shows the 'Project Activity' search page with a 'Look Up Project' dialog box open. The dialog box has a 'Business Unit' field (set to MDJUD) and 'Project' and 'Description' fields with dropdown menus. It also has 'Look Up', 'Clear', and 'Cancel' buttons, and a 'Basic Lookup' link. Below the dialog box, the 'Search Results' section is visible, showing a table with columns 'Project' and 'Description'. The table contains several rows of data, including 'AOCPROJECT# Grant Name', 'JSPROJ1 Unit Test PC', 'TESTPC Test Project', 'UNITTEST-GMCAPC Unit Test Grant Proposal to A', 'UNITTEST-PC Unit Test PC', and 'UNITTEST-PCAGM Grant Reimbursable'.



Step	Action
4.	<p>The <b>Look Up Project</b> page displays.</p> <p>Click a valid project link. For this example, click <b>AOCPROJECT#</b>.</p> <p><b>AOCPROJECT#</b></p>
5.	<p>Click the <b>Look up Activity (Alt+5)</b> button.</p> <p></p>



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window ? Help http

General Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: = MDJUD

Project: begins with AOCPROJECT#

Activity: begins with

WBS ID: begins with

Project Description: begins with

Activity Description: begins with

Activity Type: begins with

Processing Status: =

Activity Owner: begins with

New Milestone: =

☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Look Up Activity

Activity: begins with

WBS ID: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

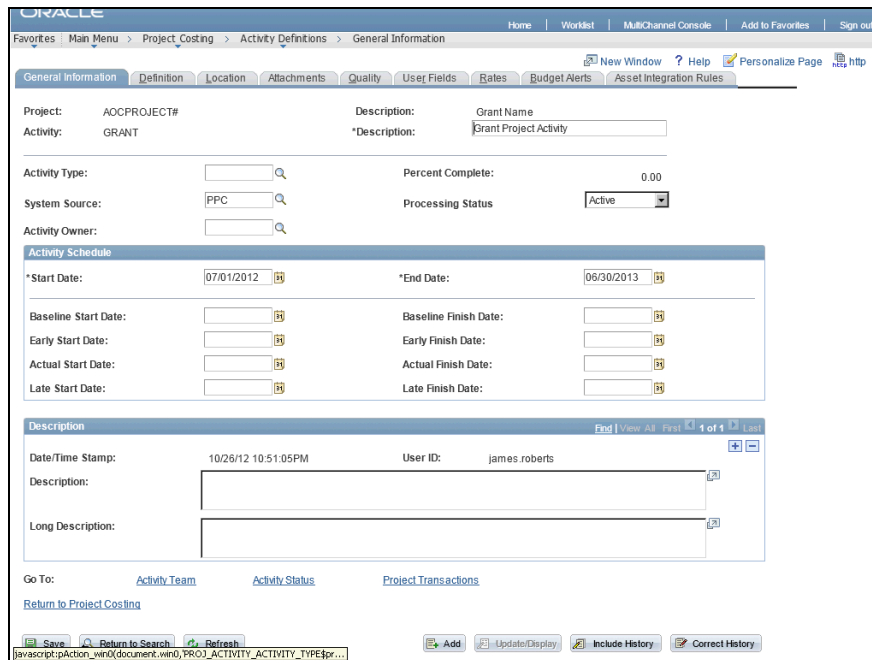
View 100 First 1 of 1 Last


WBS ID	Activity	Description
	GRANT	Grant Protect Activity

[javascript:doUpdateParent(document.window,'1CRow0')]

Step	Action
6.	<p>The <b>Look Up Activity</b> page displays.</p> <p>Click the <b>GRANT</b> activity link.</p> <p><b>GRANT</b></p>
7.	<p>Click the <b>Search</b> button.</p> <p><b>Search</b></p>





Step	Action
8.	<p>The <b>General Information</b> page displays.</p> <p>Use the <b>General Information</b> tab to update and modify the Project Activity information on a basic level. The other tabs will help to narrow down additional details.</p>
9.	<p>Use <b>Activity Type</b> to group similar activities for reporting and analysis or to enforce a predefined progression of statuses for activities of this type. This is not a required value.</p> <p>Click the <b>Look up Activity Type (Alt+5)</b> button.</p> 



# Training Guide

## GR210 Managing Grant Awards




The screenshot shows the Oracle GR210 Managing Grant Awards interface. A 'Look Up Activity Type' dialog box is open, displaying search results for Activity Type '00000'. The dialog box includes fields for SetID (SHARE), Activity Type (begins with), and buttons for Look Up, Clear, Cancel, and Basic Lookup. The search results table shows one result: Activity Type '00000' with Description 'None'.

Step	Action
10.	<p>The <b>Look Up Activity Type</b> page displays.</p> <p>Click the appropriate link. In this example, click the <b>00000</b> Activity Type link.</p> <p><b>00000</b></p>

The screenshot shows the Oracle GR210 Managing Grant Awards interface with the 'General Information' tab selected. The form displays various fields including Project (AOCPROJECT#), Activity (GRANT), Activity Type (00000), System Source (PPC), Activity Owner, Activity Schedule (Start Date: 07/01/2012, End Date: 06/30/2013), and Description (Date/Time Stamp: 10/26/12 10:51:05PM, User ID: james.roberts). The 'Look Up Activity Type' dialog box is no longer visible.



Step	Action
11.	<p>The <b>Percent Complete</b> field displays the percentage of the activity completed based on calculation method that you define on the <b>Project Costing Definition</b> page. If you select Manual in the <b>Calculation Method</b> field, you can enter a value in the <b>Percent Complete</b> field on this page.</p> <p>This field does not appear for activities with a processing status of "Template".</p>
12.	Use the <b>Description</b> field to enter a brief description for the activity.
13.	<p>Click the <b>Save</b> button.</p> 
14.	<p>You have successfully completed the <i>Updating Project Activities</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Modify project activities</li> </ul> <p><b>End of Procedure.</b></p>

## Lesson 4: Tracking Grant Costs and Expenses

### Lesson Overview

In GEARS, you can pull requisitions and/or purchase orders into Project Costing to track grant project costs. Run the Cost Purchasing to Project Costing process after requisitions and/or purchase orders have been created in the Purchasing module to capture the associated costs.

Likewise, you can collect expenses that have been created against a grant project budget. Vouchers that are approved and posted in the GEARS Payables module are loaded into the Project Costing module via the **AP to PC Interface** process.

### Lesson Objectives

In this lesson, you learn how to:

- Collect and analyze grant Purchasing costs
- Collect and analyze grant Payables expenses

### 4.1 Collecting and Analyzing Grant Purchasing Costs

The GEARS software enables you to pull requisitions, purchase orders, or both into Project Costing. If you have set up appropriate exchange rates, transaction amounts that are not in your business unit currency are converted during the integration process. Run the Purchasing to Project Costing process after requisitions and/or purchase orders have been created in the Purchasing module.

In this section, you will perform the following tasks:

- Collecting Purchasing Costs into Project Costing
- Reviewing Grant Purchasing Transactions
- Collecting Purchasing Cost Adjustments



#### 4.1.1 Collecting Purchasing Costs into Project Costing

The GEARS software enables you to pull requisitions, purchase orders, or both into Project Costing. If you have set up appropriate exchange rates, transaction amounts that are not in your business unit currency are converted during the integration process. Run the Purchasing to Project Costing process after requisitions and/or purchase orders have been created in the Purchasing module.

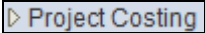


In this topic the requisitions and purchase orders previously created will be collected into project costing.

After completing this topic you will be able to:

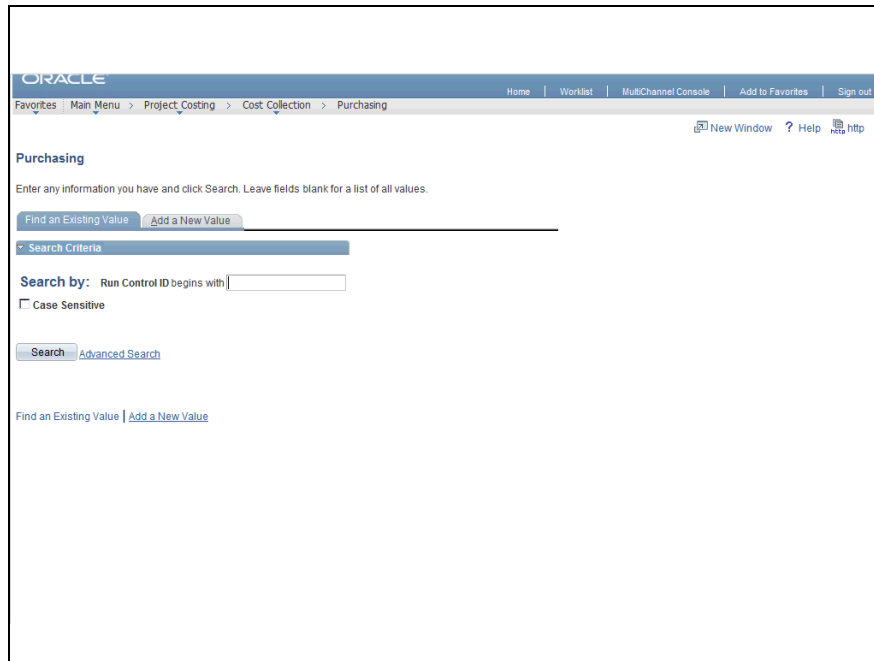
- Collect requisitions and purchase orders into project costing.

#### Procedure

Purchases have been approved for your specific project and your goal is to load the purchasing information into Project Costing.

Step	Action
1.	Begin by navigating to the <b>Purchasing</b> page.  Click the <b>Project Costing</b> link. 
2.	Click the <b>Cost Collection</b> link. 
3.	Click the <b>Purchasing</b> link. 





ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Project Costing > Cost Collection > Purchasing

New Window ? Help http

**Purchasing**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

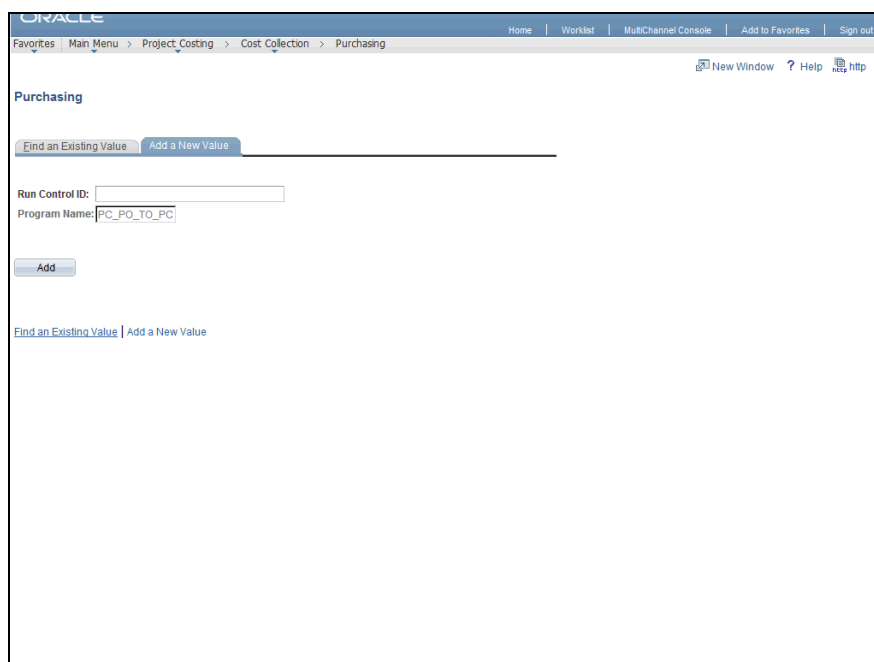
Search by: Run Control ID begins with

☐ Case Sensitive

Search Advanced Search

Find an Existing Value | Add a New Value

Step	Action
4.	<p>The Cost Collection <b>Purchasing</b> search page displays.</p> <p>Click the <b>Add a New Value</b> tab to add a new run control.</p> <p>Add a New Value</p>



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Project Costing > Cost Collection > Purchasing

New Window ? Help http

**Purchasing**

Find an Existing Value Add a New Value

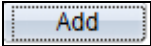
Run Control ID:

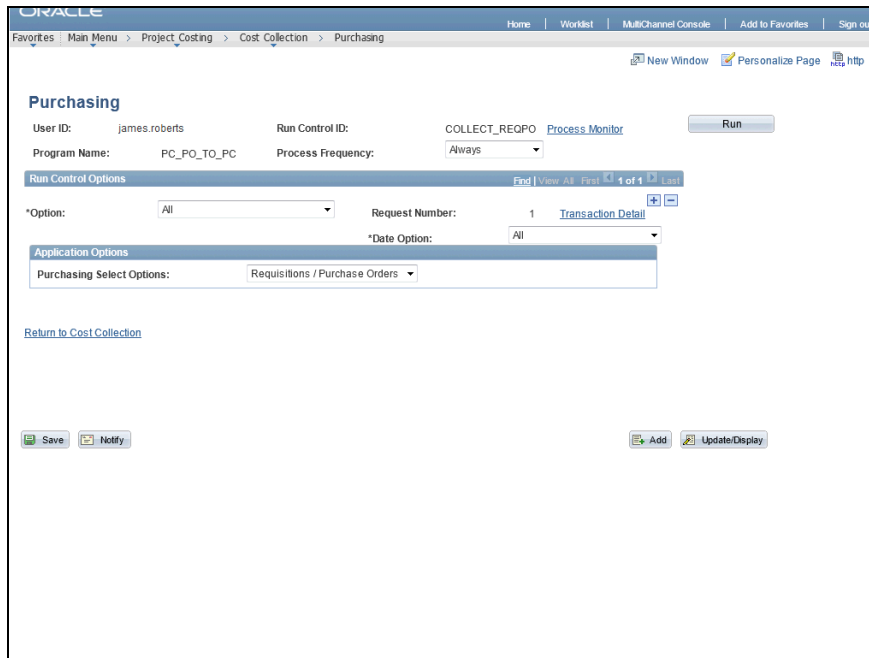
Program Name: PC\_PO\_TO\_PC



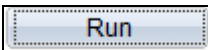
Add

Find an Existing Value | Add a New Value

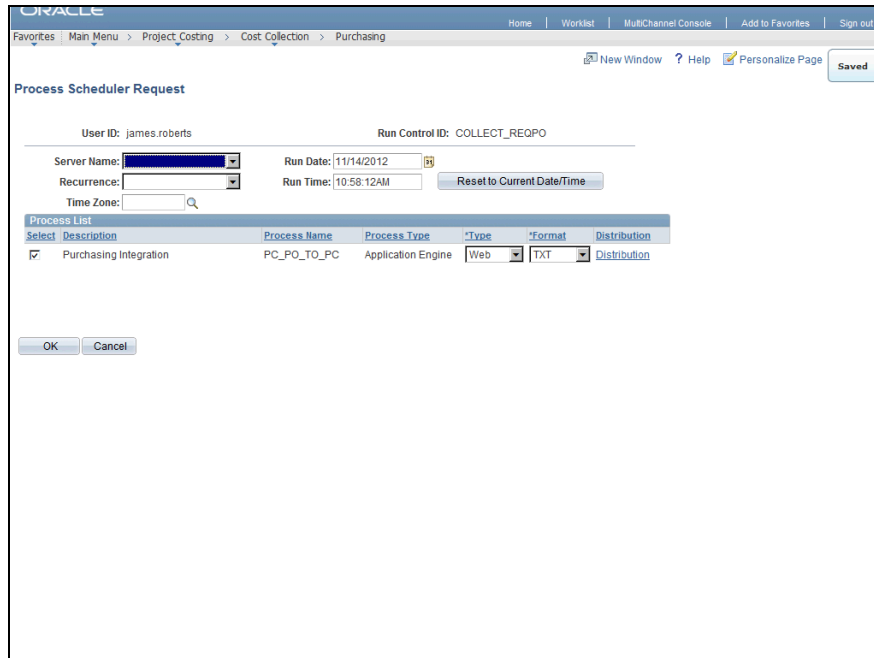


Step	Action
5.	The <b>Add a New Value</b> tab displays.  Enter a run control ID into the <b>Run Control ID</b> field.
6.	Click the <b>Add</b> button. 



Step	Action
7.	The <b>Purchasing</b> page displays.  Click the <b>Option</b> list. 
8.	Click the <b>Business Unit/Project</b> list item. 
9.	Enter the desired information into the <b>Business Unit</b> field. For this example, enter " <b>MDJUD</b> ".
10.	Enter the desired information into the <b>Project</b> field. For this example, enter " <b>10SJITEEN-G08A5</b> ".
11.	Click the <b>Run</b> button. 





Oracle  
 Favorites | Main Menu > Project Costing > Cost Collection > Purchasing  
 Home | Worklist | MultiChannel Console | Add to Favorites | Sign out  
 New Window ? Help Personalize Page Saved


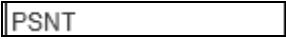
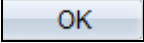
**Process Scheduler Request**

User ID: james.roberts Run Control ID: COLLECT\_REOPO

Server Name: [Dropdown] Run Date: 11/14/2012 [Calendar Icon]  
 Recurrence: [Dropdown] Run Time: 10:58:12AM [Reset to Current Date/Time]  
 Time Zone: [Dropdown] [Search Icon]

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Purchasing Integration	PC_PO_TO_PC	Application Engine	Web	TXT	Distribution

OK Cancel

Step	Action
12.	<p>The <b>Process Scheduler Request</b> page displays.</p> <p>Use the <b>Process Scheduler Request</b> page to enter or update parameters, such as server name and process output format.</p>
13.	<p>You must select a <b>Server Name</b> to identify the server on which the process will run. Click the <b>Server Name</b> list.</p> 
14.	<p>Click the <b>PSNT</b> list item.</p> 
15.	<p>In the <b>Process List</b> section, verify that the <b>Purchasing Integration (PC_PO_TO_PC)</b> process is selected.</p>
16.	<p>Click the <b>OK</b> button.</p> 
17.	<p>The <b>Purchasing</b> page displays.</p> <p>The <b>Process Instance</b> number displays. This number helps you identify the process you have run when you check the status.</p>



# Training Guide

## GR210 Managing Grant Awards



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Project\_Costing > Cost Collection > Purchasing

New Window ? Help Personalize Page http

### Purchasing

User ID: james.roberts Run Control ID: COLLECT\_REQPO [Process Monitor](#) [Run](#)

Program Name: PC\_PO\_TO\_PC Process Frequency: Always Process Instance:13626

**Run Control Options** Find | View All | First | 1 of 1 | Last

\*Option: Business Unit/Project Request Number: 1 [Transaction Detail](#)

Business Unit: MDJUD \*Date Option: All

Project: 10SJITEEN-G08A5

**Application Options**

Purchasing Select Options: Requisitions / Purchase Orders

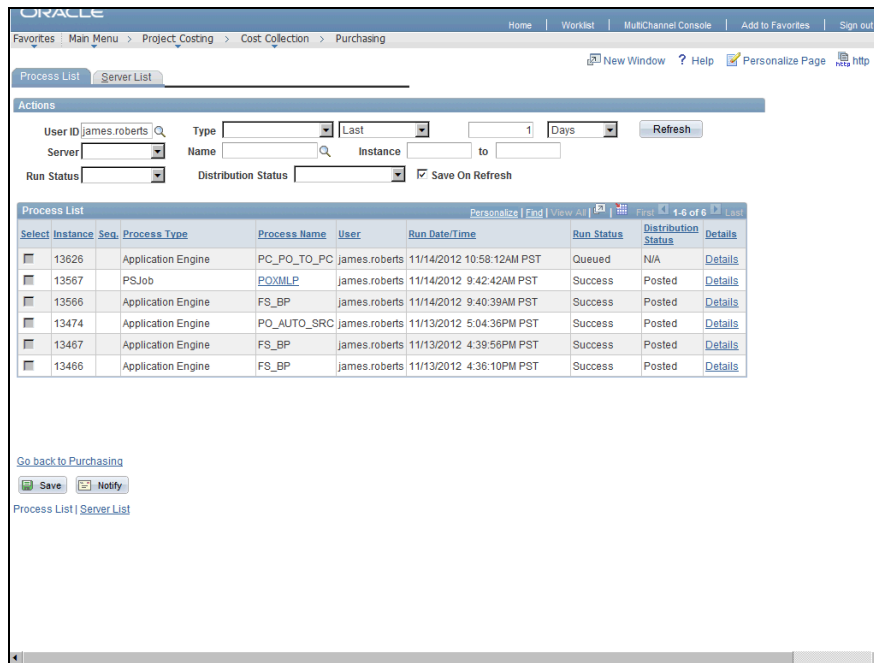
[Return to Cost Collection](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

<http://oracle14.courts.state.md.us:12080/jsc/faces/EMPLOYEE/BRP/C/>

Step	Action
18.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>
19.	The <b>Process Monitor - Process List</b> page displays.  The process instance number for the process you just ran is listed in the <b>Process List</b> section.





Oracle  
 Favorites | Main Menu > Project Costing > Cost Collection > Purchasing  
 Home | Worklist | MultiChannel Console | Add to Favorites | Sign out  
 Process List | Server List  
 New Window ? Help Personalize Page http

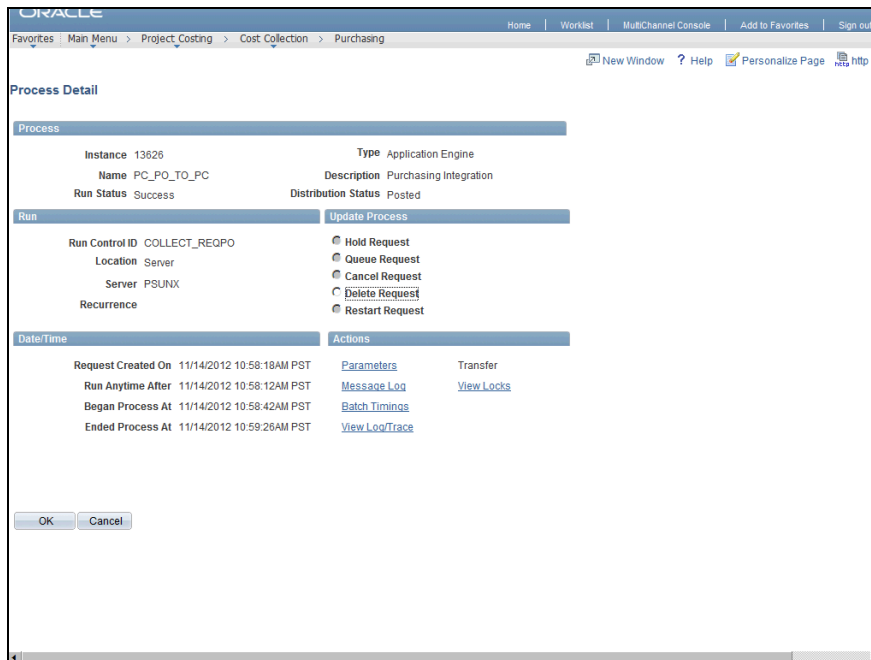
Actions  
 User ID: james.roberts | Type: | Last: | Days: | Refresh  
 Server: | Name: | Instance: | to: |  
 Run Status: | Distribution Status: | Save On Refresh

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	13626		Application Engine	PC_PO_TO_PC	james.roberts	11/14/2012 10:58:12AM PST	Queued	N/A	<a href="#">Details</a>
<input type="checkbox"/>	13567		PSJob	POXMLP	james.roberts	11/14/2012 9:42:42AM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13566		Application Engine	FS_BP	james.roberts	11/14/2012 9:40:39AM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13474		Application Engine	PO_AUTO_SRC	james.roberts	11/13/2012 5:04:36PM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13467		Application Engine	FS_BP	james.roberts	11/13/2012 4:39:56PM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13466		Application Engine	FS_BP	james.roberts	11/13/2012 4:36:10PM PST	Success	Posted	<a href="#">Details</a>

Go back to Purchasing  
 Save Notify  
 Process List | Server List

Step	Action
20.	If needed, click the <b>Refresh</b> button periodically until the Run Status is "Success" and the Distribution Status is "Posted". <div>Refresh</div>
21.	After the process statuses have updated, click the <b>Details</b> link in the corresponding row to review the process results. <div>Details</div>





**Process Detail**

<b>Process</b>	Instance: 13826	Type: Application Engine
	Name: PC_PO_TO_PC	Description: Purchasing Integration
	Run Status: Success	Distribution Status: Posted

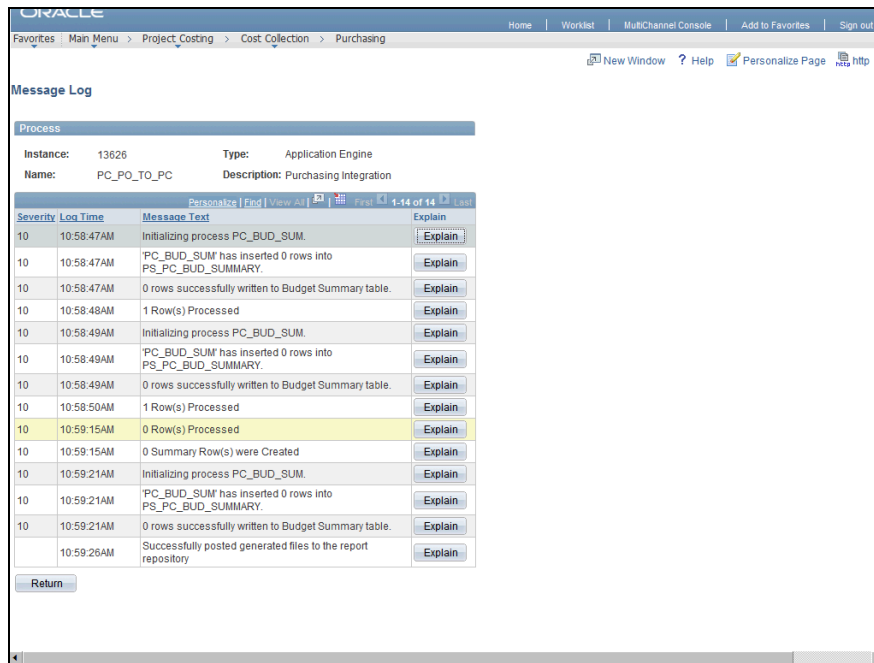
<b>Run</b>	<b>Update Process</b>
Run Control ID: COLLECT_REQPO	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSUNX	<input type="radio"/> Cancel Request
Recurrence:	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

<b>Date/Time</b>	<b>Actions</b>
Request Created On: 11/14/2012 10:58:18AM PST	<a href="#">Parameters</a> <a href="#">Transfer</a>
Run Anytime After: 11/14/2012 10:58:12AM PST	<a href="#">Message Log</a> <a href="#">View Locks</a>
Began Process At: 11/14/2012 10:58:42AM PST	<a href="#">Batch Timings</a>
Ended Process At: 11/14/2012 10:59:26AM PST	<a href="#">View Log/Trace</a>

OK Cancel

Step	Action
22.	<p>The <b>Process Detail</b> page displays.</p> <p>In the <b>Actions</b> section, click the <b>Message Log</b> link.</p> <p><a href="#">Message Log</a></p>
23.	<p>The <b>Message Log</b> page for the process displays.</p> <p>Review the message(s) generated to determine the number of rows processed successfully.</p>





**Message Log**

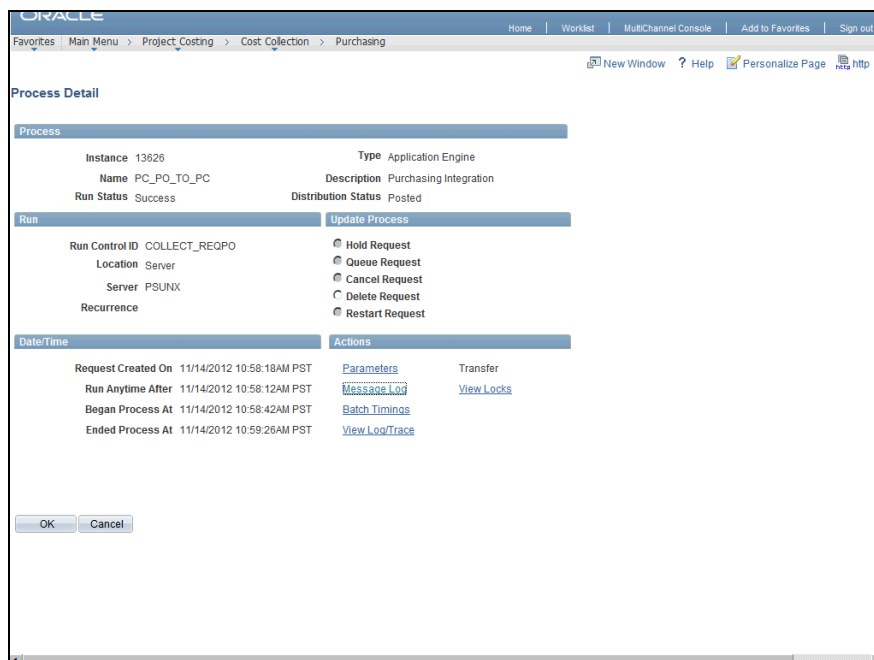
Process

Instance: 13626      Type: Application Engine  
Name: PC\_PO\_TO\_PC      Description: Purchasing Integration

Severity	LogTime	MessageText	Explain
10	10:58:47AM	Initializing process PC_BUD_SUM.	<a href="#">Explain</a>
10	10:58:47AM	PC_BUD_SUM has inserted 0 rows into PS_PC_BUD_SUMMARY.	<a href="#">Explain</a>
10	10:58:47AM	0 rows successfully written to Budget Summary table.	<a href="#">Explain</a>
10	10:58:48AM	1 Row(s) Processed	<a href="#">Explain</a>
10	10:58:49AM	Initializing process PC_BUD_SUM.	<a href="#">Explain</a>
10	10:58:49AM	PC_BUD_SUM has inserted 0 rows into PS_PC_BUD_SUMMARY.	<a href="#">Explain</a>
10	10:58:49AM	0 rows successfully written to Budget Summary table.	<a href="#">Explain</a>
10	10:58:50AM	1 Row(s) Processed	<a href="#">Explain</a>
10	10:59:15AM	0 Row(s) Processed	<a href="#">Explain</a>
10	10:59:15AM	0 Summary Row(s) were Created	<a href="#">Explain</a>
10	10:59:21AM	Initializing process PC_BUD_SUM.	<a href="#">Explain</a>
10	10:59:21AM	PC_BUD_SUM has inserted 0 rows into PS_PC_BUD_SUMMARY.	<a href="#">Explain</a>
10	10:59:21AM	0 rows successfully written to Budget Summary table.	<a href="#">Explain</a>
10	10:59:26AM	Successfully posted generated files to the report repository	<a href="#">Explain</a>

[Return](#)

Step	Action
24.	Click the <b>Return</b> button.



**Process Detail**

Process

Instance: 13626      Type: Application Engine  
Name: PC\_PO\_TO\_PC      Description: Purchasing Integration  
Run Status: Success      Distribution Status: Posted

**Run**

Run Control ID: COLLECT\_REQPO  
Location: Server  
Server: PSUNIX  
Recurrence:

**Update Process**

☒ Hold Request  
☒ Queue Request  
☒ Cancel Request  
☐ Delete Request  
☒ Restart Request

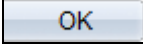
**Date/Time**

Request Created On: 11/14/2012 10:58:18AM PST  
Run Anytime After: 11/14/2012 10:58:12AM PST  
Began Process At: 11/14/2012 10:58:42AM PST  
Ended Process At: 11/14/2012 10:59:26AM PST

[Parameters](#)      [Transfer](#)  
[Message Log](#)      [View Locks](#)  
[Batch Timings](#)  
[View Log/Trace](#)

[OK](#)      [Cancel](#)



Step	Action
25.	<p>The <b>Process Detail</b> page displays.</p> <p>Click the <b>OK</b> button to return to the <b>Process Monitor - Process List</b> page.</p> 
26.	<p>You have successfully completed the <i>Collecting Purchasing Costs into Project Costing</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Collect purchasing costs into project costing</li> </ul> <p><b>End of Procedure.</b></p>

#### 4.1.2 Reviewing Grant Purchasing Transactions

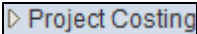


GEARS allows you to pull requisitions, purchase orders, or both into Project Costing. After running the Purchasing to Project Costing process after requisitions and/or purchase orders have been created in the Purchasing module.

After completing this topic, you will be able to:

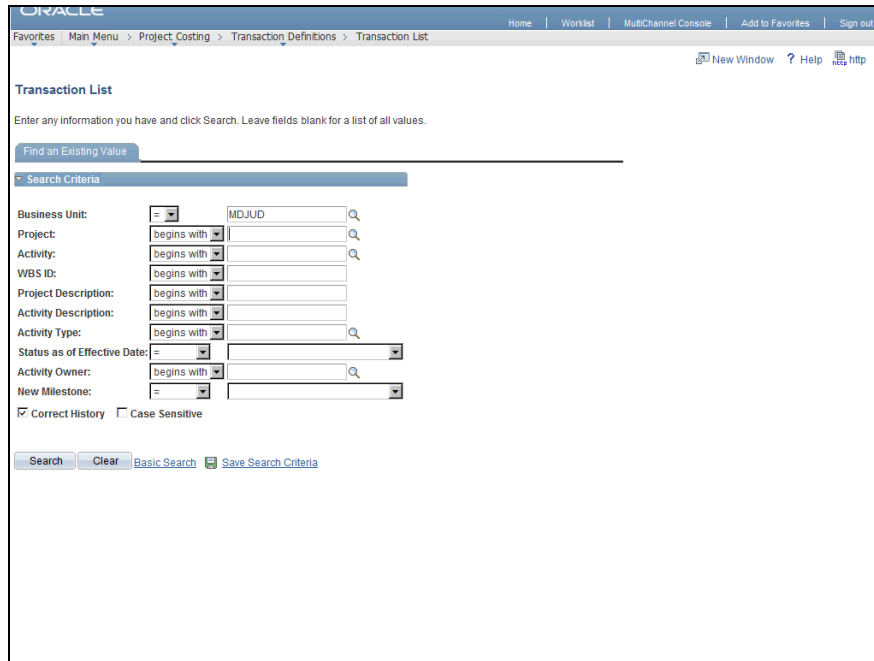
- Review grant Purchasing transactions after the Purchasing to Project Costing process has been run successfully

#### Procedure

In this topic, you will review Grant Purchasing transactions.

Step	Action
1.	<p>Begin by navigating to the <b>Transaction List</b> page.</p> <p>Click the <b>Project Costing</b> link.</p> 
2.	<p>Click the <b>Transaction Definitions</b> link.</p> 
3.	<p>Click the <b>Transaction List</b> link.</p> 





Transaction List

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit: = MDJUD

Project: begins with

Activity: begins with

WBS ID: begins with

Project Description: begins with

Activity Description: begins with

Activity Type: begins with


Status as of Effective Date: =

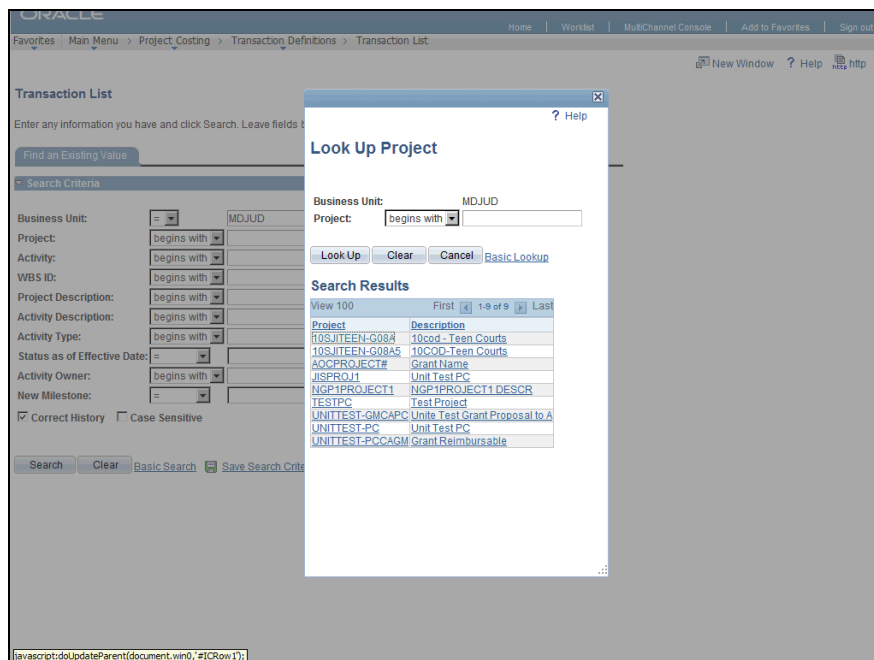
Activity Owner: begins with

New Milestone: =

☒ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Step	Action
4.	<p>The <b>Transaction List</b> search page displays.</p> <p>Click the <b>Look up Project (Alt+5)</b> button.</p> 



Transaction List

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit: = MDJUD

Project: begins with

Activity: begins with

WBS ID: begins with

Project Description: begins with

Activity Description: begins with

Activity Type: begins with

Status as of Effective Date: =

Activity Owner: begins with

New Milestone: =

☒ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Look Up Project

Business Unit: MDJUD

Project: begins with

Look Up Clear Cancel Basic Lookup


Search Results

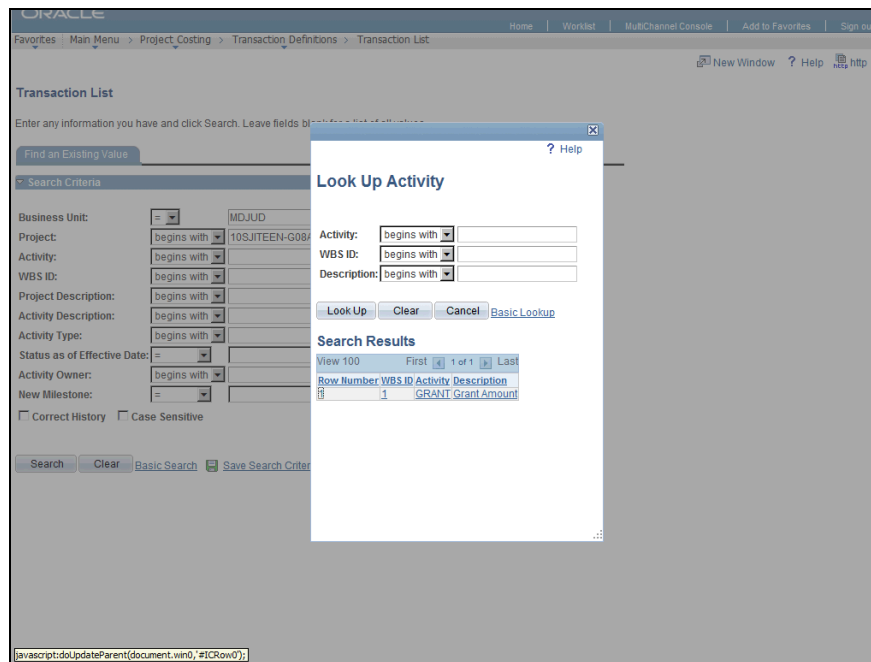
View 100 First 1-9 of 9 Last

Project	Description
10S.JITEEN-G08A	10cod - Teen Courts
10S.JITEEN-G08A5	10C00-Teen Courts
ACCPROJECT	Grant Name
JISPROJ1	Unit Test PC
NGP1PROJECT1	NGP1PROJECT1 DESCR
TESTPC	Test Project
UNITTEST-GMCAPC	Unit Test Grant Proposal to A
UNITTEST-PC	Unit Test PC
UNITTEST-PCCAGM	Grant Reimbursable

javascript:doUpdateParent(document.win0, #1Row1);

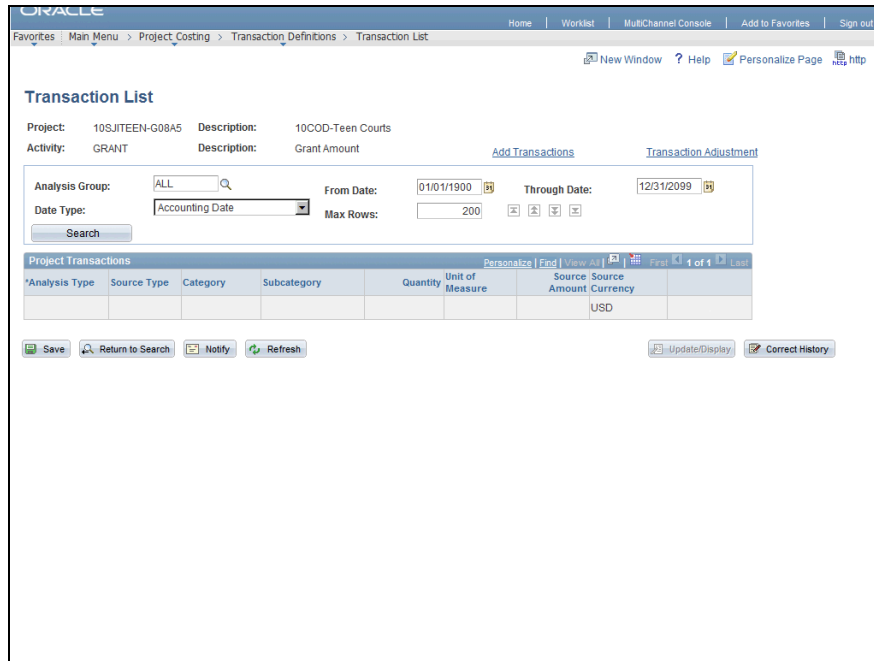


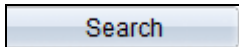
Step	Action
5.	<p>The <b>Look Up Project</b> page displays.</p> <p>Click a valid project link. For this example, click <b>10SJITEEN-G08A5</b>.</p> <p><b>10SJITEEN-G08A5</b></p>
6.	<p>Click the <b>Look up Activity (Alt+5)</b> button.</p> <p></p>



Step	Action
7.	<p>The <b>Look Up Activity</b> page displays.</p> <p>Click the <b>GRANT</b> link.</p> <p><b>GRANT</b></p>
8.	<p>Click the <b>Search</b> button.</p> <p><b>Search</b></p>
9.	<p>Click the <b>10SJITEENG08A5</b> link.</p> <p><b>10SJITEENG08A5</b></p>





Step	Action
10.	<p>The <b>Transaction List</b> page displays.</p> <p>Use the <b>Transaction List</b> page to view the results of processing the Grants transactions into the Project Costing module.</p>
11.	<p>Be sure the <b>Analysis Group</b>, <b>From Date</b>, <b>Through Date</b>, and <b>Date Type</b> fields are populated before searching.</p> <p>Click the <b>Search</b> button.</p> <div data-bbox="436 1253 673 1299" data-label="Image">  </div>



# Training Guide

## GR210 Managing Grant Awards



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Project Costing > Transaction Definitions > Transaction List

New Window ? Help Personalize Page http

### Transaction List

Project: 10SJITEEN-G08A5 Description: 10COD-Teen Courts  
Activity: GRANT Description: Grant Amount [Add Transactions](#) [Transaction Adjustment](#)

Analysis Group: ALL From Date: 01/01/1900 Through Date: 12/31/2099  
Date Type: Accounting Date Max Rows: 200 1 to 11 of 11

Search

Project Transactions				Personalize	Find	View All	First	4-7 of 11	Last
*Analysis Type	Source Type	Category	Subcategory	Quantity	Unit of Measure	Source Amount	Source Currency	Transaction Detail	Drill to Source
BUD						10,000.00	USD		
BIL				1.00	EA	100.00	USD		
BIL				200.00	EA	200.00	USD		
CRV				200.00	EA	200.00	USD		
COM				200.00	EA	200.00	USD		
COM				100.00	EA	100.00	USD		
REQ				200.00	EA	200.00	USD		

Save Return to Search Notify Refresh Update/Display Correct History

Step	Action
12.	Click the <b>View All</b> link. <a href="#">View All</a>

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Project Costing > Transaction Definitions > Transaction List

New Window ? Help Personalize Page http

### Transaction List

Project: 10SJITEEN-G08A5 Description: 10COD-Teen Courts  
Activity: GRANT Description: Grant Amount [Add Transactions](#) [Transaction Adjustment](#)


Analysis Group: ALL From Date: 01/01/1900 Through Date: 12/31/2099  
Date Type: Accounting Date Max Rows: 200 1 to 11 of 11

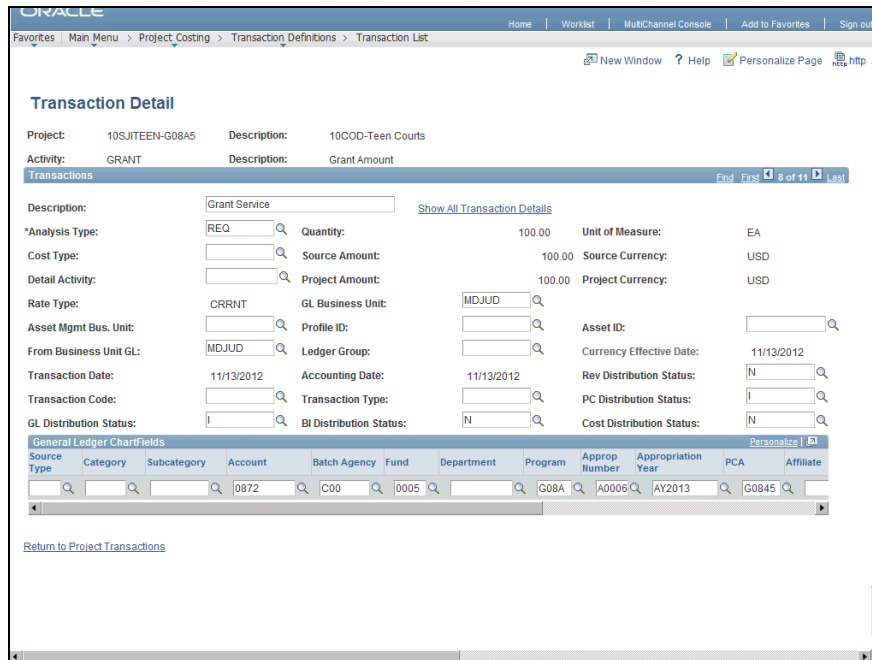
Search

Project Transactions				Personalize	Find	View 7	First	4-11 of 11	Last
*Analysis Type	Source Type	Category	Subcategory	Quantity	Unit of Measure	Source Amount	Source Currency	Transaction Detail	Drill to Source
BUD						10,000.00	USD		
BIL				1.00	EA	100.00	USD		
BIL				200.00	EA	200.00	USD		
CRV				200.00	EA	200.00	USD		
COM				200.00	EA	200.00	USD		
COM				100.00	EA	100.00	USD		
REQ				200.00	EA	200.00	USD		
REQ				100.00	EA	100.00	USD		
RRV				200.00	EA	200.00	USD		
ACT				1.00	EA	100.00	USD		
ACT				200.00	EA	200.00	USD		

Save Return to Search Notify Refresh Update/Display Correct History



Step	Action
13.	Click the <b>Transaction Detail</b> button. 



Transaction Detail  
 Project: 10SJITEEN-G08A5 Description: 10COD-Teen Courts  
 Activity: GRANT Description: Grant Amount  
 Transactions: 1 of 11 Last  
 Description: Grant Service [Show All Transaction Details](#)  
 \*Analysis Type: REQ Quantity: 100.00 Unit of Measure: EA  
 Cost Type: Source Amount: 100.00 Source Currency: USD  
 Detail Activity: Project Amount: 100.00 Project Currency: USD  
 Rate Type: CRRNT GL Business Unit: MDJUD  
 Asset Mgmt Bus. Unit: Profile ID: Asset ID:  
 From Business Unit GL: MDJUD Ledger Group: Currency Effective Date: 11/13/2012  
 Transaction Date: 11/13/2012 Accounting Date: 11/13/2012 Rev Distribution Status: N  
 Transaction Code: Transaction Type: PC Distribution Status: I  
 GL Distribution Status: BI Distribution Status: N Cost Distribution Status: N  
 General Ledger ChartFields: [Personalize](#)  
 Source Type Category Subcategory Account Batch Agency Fund Department Program Approp Number Appropriation Year PCA Affiliate  
 0872 C00 0005 G08A A0006 AY2013 G0845  
[Return to Project Transactions](#)

Step	Action
14.	The <b>Transaction Detail</b> page displays. Click the <b>Show All Transaction Details</b> link. <a href="#">Show All Transaction Details</a>



# Training Guide

## GR210 Managing Grant Awards



ORACLE  
Favorites | Main Menu > Project Costing > Transaction Definitions > Transaction List

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window ? Help Personalize Page http

### Show All Transaction Details

Project/Activity

Project: 10SJITEEN-G08A5 Description: 10COD-Teen Courts  
Activity: GRANT Description: Grant Amount

[Return to Transaction Detail](#)

Transactions		End	First	6 of 11	Last
Description:	Grant Service				
General Ledger Business Unit:	MDJUD	Source Amount:		100.00	
Rate Type:	CRRNT	Quantity:		100.00	
Analysis Type:	REQ	Currency:		USD	
Source Type:		Unit of Measure:		EA	
Category:					
Subcategory:					

### Transaction Details

General Information

Transaction ID:	RMDJUD0000000016#1#1#1	Original Transaction ID:	RMDJUD0000000016#1#1#1
Transaction Date:	11/13/2012	Accounting Date:	11/13/2012
Currency Effective Date:	11/13/2012	Rate Type:	CRRNT
Rate Multiplier:	1.00000000	Rate Divisor:	1.00000000
PCBU Transaction Amount:	100.00	PCBU Currency Code:	USD
Project Transaction Amount:	100.00	Project Currency Code:	USD
Project Transaction Type:		Feeder Sum ID:	0
Project Transaction Code:		Price Sum ID:	0

Transaction User Fields

User 1:	<input type="text"/>	User 4:	<input type="text"/>
User 2:	<input type="text"/>	User 5:	<input type="text"/>
User 3:	<input type="text"/>		

Step	Action
15.	<p>The <b>Show All Transaction Details</b> page displays.</p> <p>Move the scrollbar downward to reveal additional fields.</p>

ORACLE  
Favorites | Main Menu > Project Costing > Transaction Definitions > Transaction List

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Project Transaction Amount: 100.00 Project Currency Code: USD  
Project Transaction Type: Feeder Sum ID: 0  
Project Transaction Code: Price Sum ID: 0

Transaction User Fields

User 1:	<input type="text"/>	User 4:	<input type="text"/>
User 2:	<input type="text"/>	User 5:	<input type="text"/>
User 3:	<input type="text"/>		

System Source:	PO Batch	Cost Distribution Status:	Not Distributed
Project Distribution Status:	Ignore	Rev Distribution Status:	Not Distributed
Transaction Status:		User ID:	james.roberts
Process Instance:	13626	Date/Time Stamp:	11/14/2012 10:58:48AM


Chart Fields

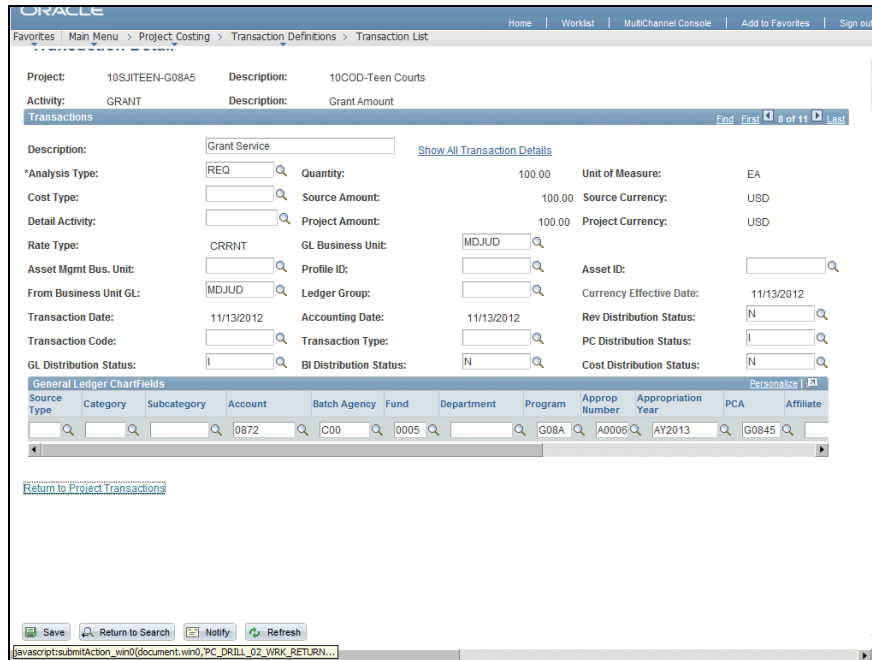
- Common Integration Fields
- Accounts Payable
- Accounts Receivable
- Asset Management
- Billing / Contracts
- Budgeting
- Funds Distribution
- General Ledger
- Inventory
- Purchasing
- Time and Labor
- Commitment Control

[Return to Transaction Detail](#)

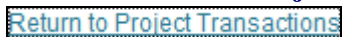
Save Return to Search Notify Refresh Update/Display Correct History



Step	Action
16.	Click the <b>Expand section</b> button for <b>Purchasing</b> . 
17.	Move the scrollbar downward to reveal additional fields.



Oracle GR210 Managing Grant Awards interface showing the Transaction List section. The section is expanded, displaying a table of transactions. The table includes columns for Source Type, Category, Subcategory, Account, Batch Agency, Fund, Department, Program, Approp Number, Appropriation Year, PCA, and Affiliate. The first row of data shows values: 0872, C00, 0005, G08A, A0000, AY2013, G0845. Below the table, there is a link labeled "Return to Project Transactions".

Step	Action
18.	Click the <b>Return to Project Transactions</b> link. 



# Training Guide

## GR210 Managing Grant Awards

ORACLE  
 Favorites | Main Menu > Project Costing > Transaction Definitions > Transaction List

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out  
 New Window ? Help Personalize Page http

### Transaction List

Project: 10SJITEEN-G08A5 Description: 10COD-Teen Courts  
 Activity: GRANT Description: Grant Amount

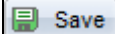
[Add Transactions](#) [Transaction Adjustment](#)

Analysis Group: ALL From Date: 01/01/1900 Through Date: 12/31/2090  
 Date Type: SetID Analysis Group Description  
 SHARE ALL All Analysis Types Rows: 200 1 to 11 of 11

Search

Project Transactions						Personalize   Find   View 7		First 4 of 11 Last	
*Analysis Type	Source Type	Category	Subcategory	Quantity	Unit of Measure	Source Amount	Source Currency	Transaction Detail	Drill to Source
BUD						10,000.00	USD		
BIL				1.00	EA	100.00	USD		
BIL				200.00	EA	200.00	USD		
CRV				200.00	EA	200.00	USD		
COM				200.00	EA	200.00	USD		
COM				100.00	EA	100.00	USD		
REQ				200.00	EA	200.00	USD		
REQ				100.00	EA	100.00	USD		
RRV				200.00	EA	200.00	USD		
ACT				1.00	EA	100.00	USD		
ACT				200.00	EA	200.00	USD		

Save Return to Search Notify Refresh Update/Display Correct History

Step	Action
19.	Click the <b>Save</b> button. 
20.	<p>You have successfully completed the <i>Reviewing Grant Purchasing Transactions</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Review grant purchasing transactions</li> </ul> <p><b>End of Procedure.</b></p>

### 4.1.3 Collecting Purchasing Cost Adjustments

Run the Purchasing to Project Costing process after requisitions and/or purchase orders have been created in the Purchasing module to collect the requisition pre-encumbrance reversals and commitment reversals.

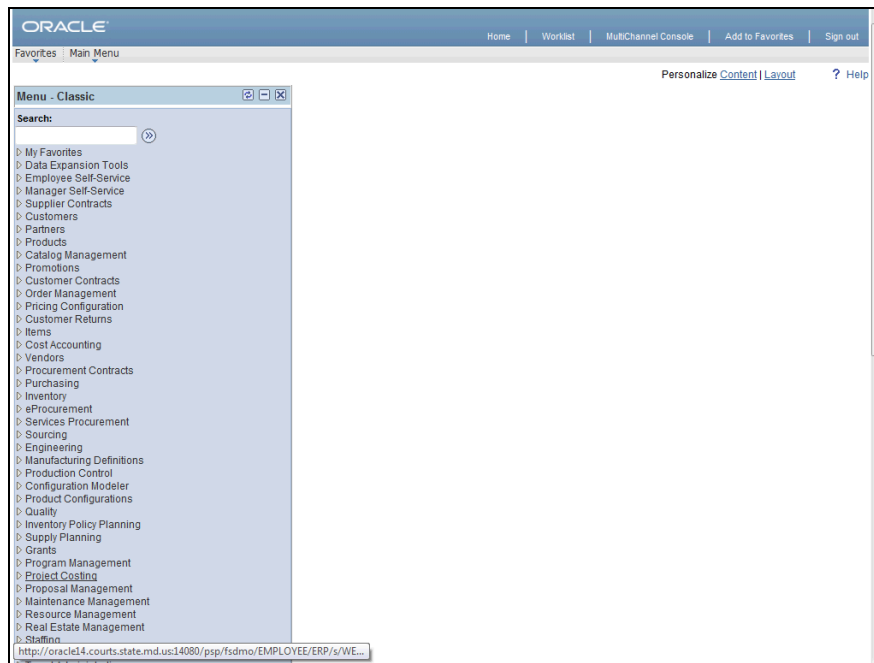
After completing this topic, you will be able to:

- Collect Purchasing Cost Adjustments

### Procedure

In this topic, you learn how to collect purchasing cost adjustments.





Step	Action
1.	<p>Begin by navigating to the <b>Purchasing Adjustments</b> page.</p> <p>Click the <b>Project Costing</b> link.</p> <p><a href="#">Project Costing</a></p>
2.	<p>Click the <b>Cost Collection</b> link.</p> <p><a href="#">Cost Collection</a></p>
3.	<p>Click the <b>Purchasing Adjustments</b> link.</p> <p><a href="#">Purchasing Adjustments</a></p>



# Training Guide

## GR210 Managing Grant Awards



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Project Costing > Cost Collection > Purchasing Adjustments

New Window ? Help http

### Purchasing Adjustments

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Search by: Run Control ID begins with

☐ Case Sensitive

Search Advanced Search

Find an Existing Value | Add a New Value

Step	Action
4.	<p>The <b>Purchasing Adjustments</b> search page displays.</p> <p>Click the <b>Add a New Value</b> tab.</p> <p>Add a New Value</p>

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Project Costing > Cost Collection > Purchasing Adjustments

New Window ? Help http

### Purchasing Adjustments

Find an Existing Value | Add a New Value

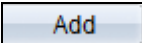
Run Control ID:

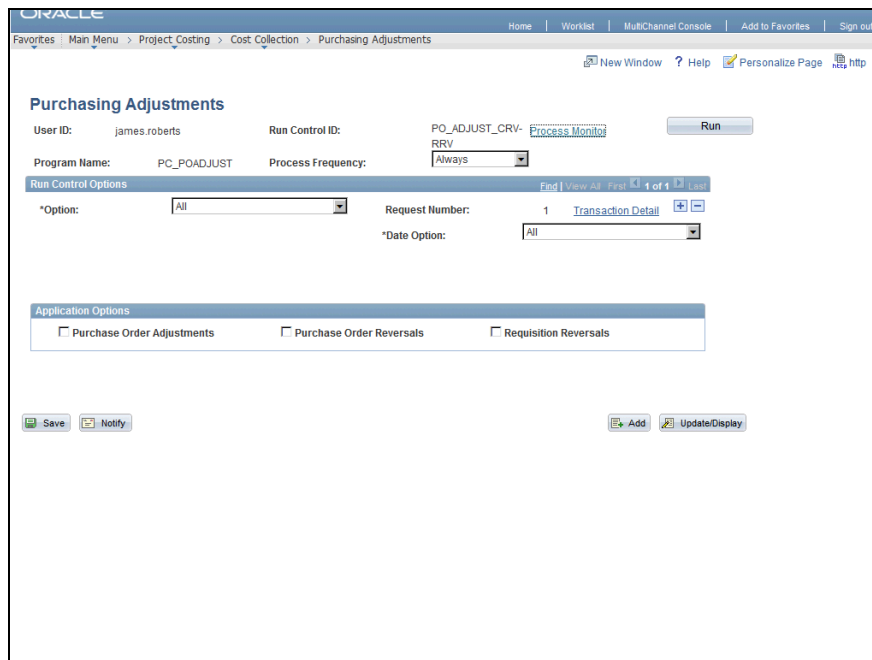
Program Name: PC\_POADJUST

Add

Find an Existing Value | Add a New Value



Step	Action
5.	<p>The <b>Add a New Value</b> tab displays.</p> <p>Enter the desired information into the <b>Run Control ID</b> field. Enter a valid value. For this example, enter "<b>PO_ADJUST_CRV-RRV</b>".</p>
6.	<p>Click the <b>Add</b> button.</p> 



Oracle  
 Favorites | Main Menu > Project Costing > Cost Collection > Purchasing Adjustments  
 Home | Worklist | MultiChannel Console | Add to Favorites | Sign out  
 New Window ? Help Personalize Page http

### Purchasing Adjustments

User ID: james.roberts Run Control ID: PO\_ADJUST\_CRV-RRV [Process Monitor](#) **Run**

Program Name: PC\_POADJUST Process Frequency: Always

**Run Control Options** Find | View All First 1 of 1 Last



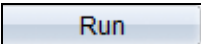
\*Option: All Request Number: 1 [Transaction Detail](#)

\*Date Option: All

**Application Options**

☐ Purchase Order Adjustments ☐ Purchase Order Reversals ☐ Requisition Reversals

Save Notify Add Update/Display

Step	Action
7.	<p>The <b>Purchasing Adjustments</b> page displays.</p> <p>Use the <b>Purchasing Adjustments</b> page to enter the request parameters. These parameters will be used to define the processing rules and data to be included when the process is run.</p>
8.	<p>Click the <b>Purchase Order Reversals</b> option.</p> 
9.	<p>Click the <b>Requisition Reversals</b> option.</p> 
10.	<p>Click the <b>Run</b> button.</p> 



ORACLE  
Favorites | Main Menu > Project Costing > Cost Collection > Purchasing Adjustments

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window ? Help Personalize Page Saved

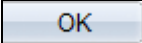
### Process Scheduler Request

User ID: james.roberts Run Control ID: PO\_ADJUST\_CRV-RRV

Server Name: [dropdown] Run Date: 11/14/2012 [calendar icon]  
 Recurrence: [dropdown] Run Time: 11:10:24AM [Reset to Current Date/Time]  
 Time Zone: [dropdown]

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Purchasing Adjustments	PC_POADJUST	Application Engine	Web	TXT	Distribution

OK Cancel

Step	Action
11.	<p>The <b>Process Scheduler Request</b> page displays.</p> <p>Click the <b>OK</b> button.</p> 

ORACLE  
Favorites | Main Menu > Project Costing > Cost Collection > Purchasing Adjustments

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window ? Help Personalize Page Saved

### Purchasing Adjustments

User ID: james.roberts Run Control ID: PO\_ADJUST\_CRV-RRV Process Monitor [Run]  
 Program Name: PC\_POADJUST Process Frequency: Always Process Instance: 13638

Run Control Options

\*Option: [dropdown] Request Number: 1 Transaction Detail [dropdown]  
 \*Date Option: [dropdown]

Application Options

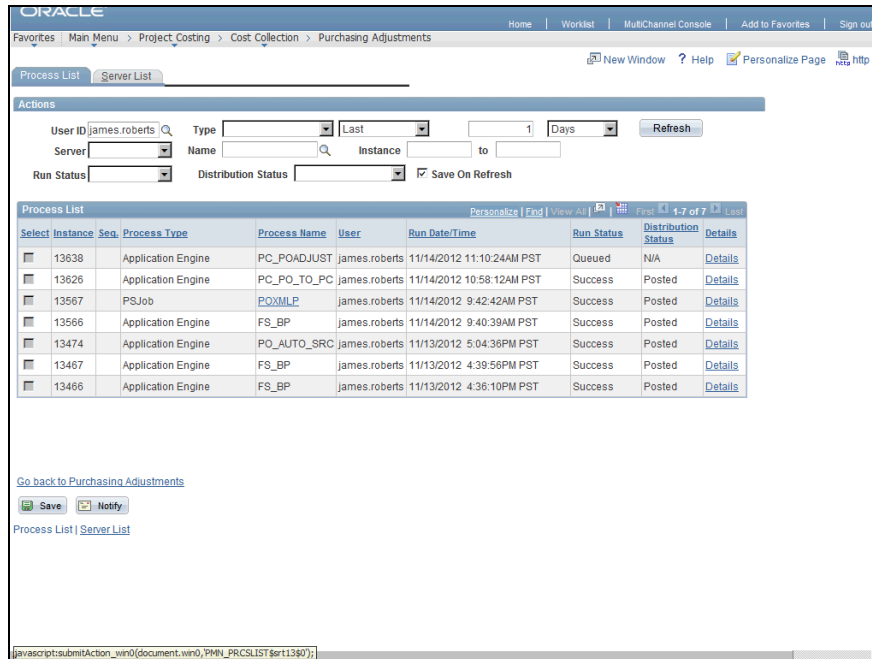
☐ Purchase Order Adjustments ☒ Purchase Order Reversals ☒ Requisition Reversals

Save Notify Add Update/Display

javascript:submitAction\_win0(document.win0,PRCSRQSTDLG\_WIRK\_LOADP...



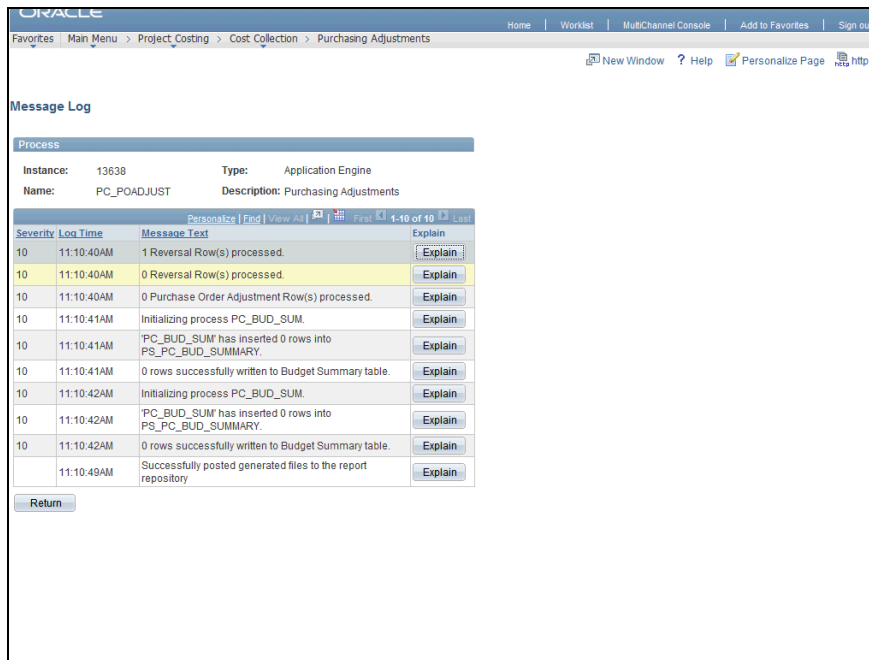
Step	Action
12.	<p>Note the <b>Process Instance</b> below the Run button.</p> <p>Click the <b>Process Monitor</b> link.</p> <p><a href="#">Process Monitor</a></p>



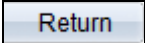
Oracle Process List interface showing a table of process instances. The table includes columns for Instance, Process Type, Process Name, User, Run Date/Time, Run Status, and Distribution Status. The Run Status column shows 'Queued' for the first instance and 'Success' for the others. The Distribution Status column shows 'N/A' for the first instance and 'Posted' for the others. The interface also includes a 'Refresh' button and a 'Details' link for each row.

Step	Action
13.	<p>The <b>Process List</b> displays.</p> <p>Click the <b>Refresh</b> button until the Run Status for your process reads "<b>Success</b>".</p> <p><a href="#">Refresh</a></p>
14.	<p>Click the <b>Details</b> link.</p> <p><a href="#">Details</a></p>





Severity	LogTime	MessageText	Explain
10	11:10:40AM	1 Reversal Row(s) processed.	<a href="#">Explain</a>
10	11:10:40AM	0 Reversal Row(s) processed.	<a href="#">Explain</a>
10	11:10:40AM	0 Purchase Order Adjustment Row(s) processed.	<a href="#">Explain</a>
10	11:10:41AM	Initializing process PC_BUD_SUM.	<a href="#">Explain</a>
10	11:10:41AM	'PC_BUD_SUM' has inserted 0 rows into PS_PC_BUD_SUMMARY.	<a href="#">Explain</a>
10	11:10:41AM	0 rows successfully written to Budget Summary table.	<a href="#">Explain</a>
10	11:10:42AM	Initializing process PC_BUD_SUM.	<a href="#">Explain</a>
10	11:10:42AM	'PC_BUD_SUM' has inserted 0 rows into PS_PC_BUD_SUMMARY.	<a href="#">Explain</a>
10	11:10:42AM	0 rows successfully written to Budget Summary table.	<a href="#">Explain</a>
10	11:10:49AM	Successfully posted generated files to the report repository	<a href="#">Explain</a>

Step	Action
15.	<p>The <b>Message Log</b> page displays.</p> <p>Be sure the Instance above matches the instance you created previously.</p> <p>Click the <b>Return</b> button.</p> 
16.	<p>You have successfully completed the <i>Collecting Purchasing Cost Adjustments</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Collect purchasing cost adjustments</li> </ul> <p><b>End of Procedure.</b></p>

## 4.2 Collecting and Analyzing Grant Payables Costs

After vouchers are approved and posted in the Payables module, you can load the approved vouchers into the GEARS Project Costing module to view vouchers created using grant funding. Use the **Vouchers by Activity** page to view the resource transactions from a specific project and activity that contain a voucher ID.

Generally, this is a two-step process:

1. Run the Cost Collection process for Payables
2. Review vouchers on the Vouchers by Activity page

After completing this section, you will be able to:



- Collect Payables into Project Costing
- Review vouchers for a grant

#### 4.2.1 Collecting Cost from Payables

In this topic, you run the AP to PC Interface process to collect expenses created in the Payables module.

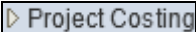


After completing this topic, you will be able to:

- Collect a voucher transaction into project costing.

#### Procedure

Vouchers for a grant have been approved and processed in Payables. You want to review the expenses created against a grant project budget.

In this topic, you will run the cost collection process for Payables.

Step	Action
1.	Begin by navigating to the <b>Payables</b> page.  Click the <b>Project Costing</b> link. 
2.	Click the <b>Cost Collection</b> link. 
3.	Click the <b>Payables</b> link. 



# Training Guide


## GR210 Managing Grant Awards

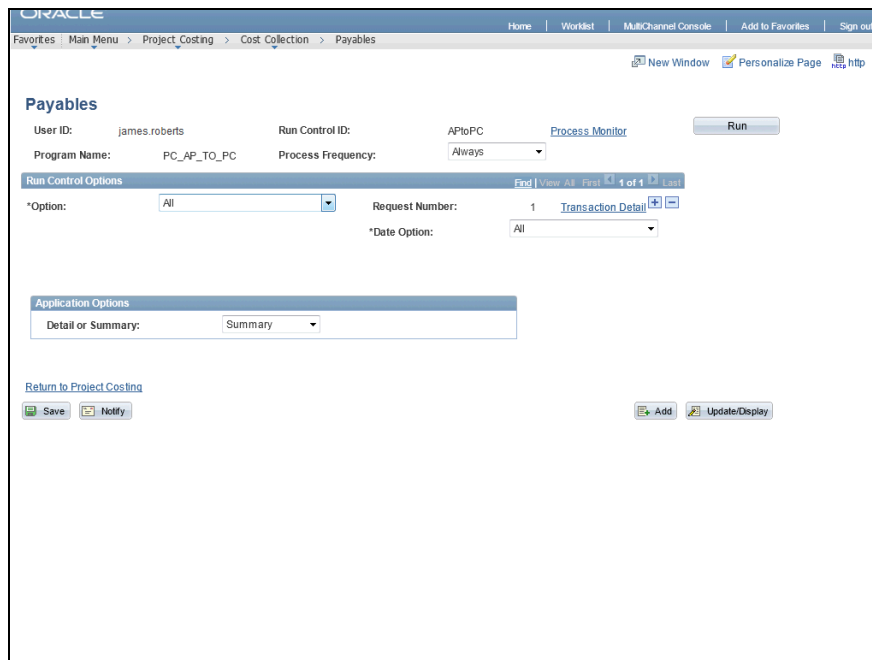
This screenshot shows the Oracle Payables search interface. At the top is the Oracle logo and a navigation bar with links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below the navigation bar is a breadcrumb trail: Favorites | Main Menu > Project\_Costing > Cost Collection > Payables. The main heading is "Payables". Below it is a text prompt: "Enter any information you have and click Search. Leave fields blank for a list of all values." There are two tabs: "Find an Existing Value" (selected) and "Add a New Value". Below the tabs is a "Search Criteria" section with a "Search by:" label and a text input field containing "Run Control ID begins with". There is also a "Case Sensitive" checkbox which is unchecked. At the bottom of the search criteria section are "Search" and "Advanced Search" buttons. At the very bottom of the page are links for "Find an Existing Value" and "Add a New Value".




Step	Action
4.	<p>The <b>Payables</b> search page displays.</p> <p>Click the <b>Add a New Value</b> tab.</p> <div>Add a New Value</div>

This screenshot shows the Oracle Payables "Add a New Value" page. The navigation bar and breadcrumb trail are the same as in the previous screenshot. The "Add a New Value" tab is now selected. Below the tabs, there are input fields for "Run Control ID:" and "Program Name:". The "Program Name" field contains the text "PC\_AP\_TO\_PC". Below these fields is an "Add" button. At the bottom of the page are links for "Find an Existing Value" and "Add a New Value".

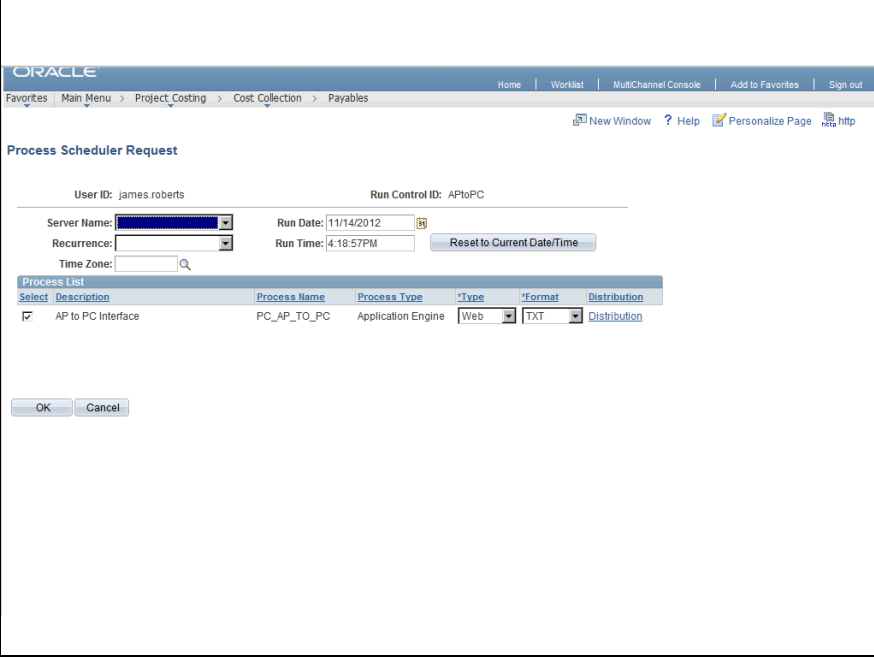


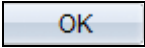

Step	Action
5.	<p>The <b>Add a New Value</b> page displays.</p> <p>Enter the desired information into the <b>Run Control ID</b> field. Enter a valid value. For this example, enter "<b>APtoPC</b>".</p>
6.	<p>Click the <b>Add</b> button.</p> 



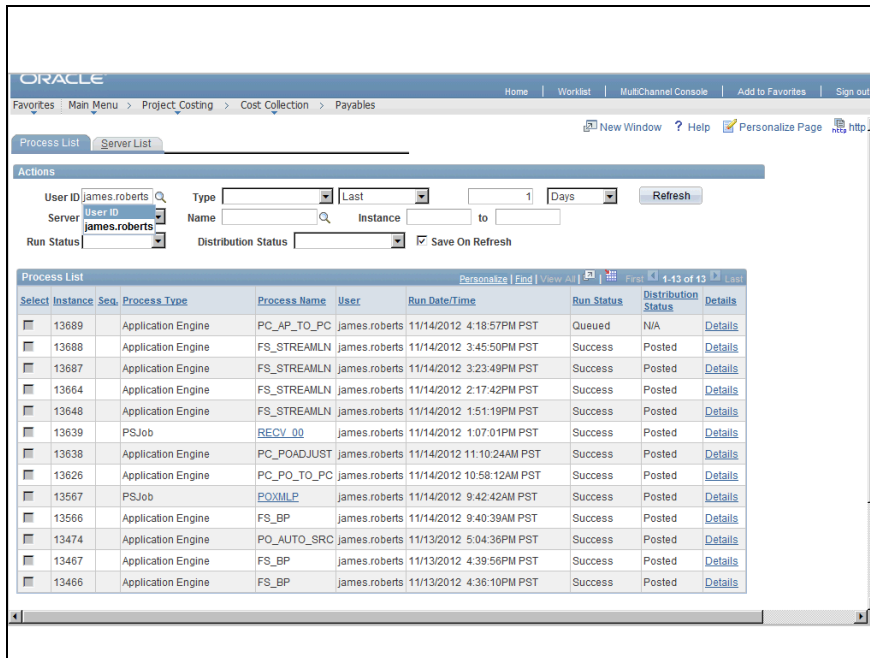
Step	Action
7.	<p>The <b>Payable</b> page displays.</p> <p>Use the Cost Collection <b>Payables</b> run control page to enter the request parameters for the <b>AP to PC Interface</b> process. These parameters will be used to define the processing rules and data to be included when the process is run.</p>
8.	<p>Click the <b>Option</b> list.</p> 
9.	<p>Click the <b>Business Unit/Project</b> list item.</p> 
10.	<p>Enter the desired information into the <b>Business Unit</b> field. Enter "<b>MDJUD</b>".</p>
11.	<p>Enter the desired information into the <b>Project</b> field. Enter "<b>10SJITEEN-G08A5</b>".</p>
12.	<p>Click the <b>Run</b> button.</p> 





Step	Action
13.	<p>The <b>Process Scheduler Request</b> page displays.</p> <p>Click the <b>OK</b> button.</p> 
14.	<p>Click the <b>Process Monitor</b> link.</p> 





ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Project Costing > Cost Collection > Payables

Process List | Server List

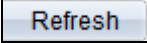

Actions

User ID: james.roberts | Type: | Last: | Days: 1 | Refresh

Server: james.roberts | Name: | Instance: | to: |

Run Status: | Distribution Status: | Save On Refresh

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	13689		Application Engine	PC_AP_TO_PC	james.roberts	11/14/2012 4:18:57PM PST	Queued	N/A	<a href="#">Details</a>
<input type="checkbox"/>	13688		Application Engine	FS_STREAMLN	james.roberts	11/14/2012 3:45:50PM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13687		Application Engine	FS_STREAMLN	james.roberts	11/14/2012 3:23:49PM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13664		Application Engine	FS_STREAMLN	james.roberts	11/14/2012 2:17:42PM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13648		Application Engine	FS_STREAMLN	james.roberts	11/14/2012 1:51:19PM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13639		PSJob	RECV_00	james.roberts	11/14/2012 1:07:01PM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13638		Application Engine	PC_POADJUST	james.roberts	11/14/2012 11:10:24AM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13626		Application Engine	PC_PO_TO_PC	james.roberts	11/14/2012 10:58:12AM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13567		PSJob	POXMLP	james.roberts	11/14/2012 9:42:42AM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13566		Application Engine	FS_BP	james.roberts	11/14/2012 9:40:39AM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13474		Application Engine	PO_AUTO_SRC	james.roberts	11/13/2012 5:04:36PM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13467		Application Engine	FS_BP	james.roberts	11/13/2012 4:39:56PM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	13466		Application Engine	FS_BP	james.roberts	11/13/2012 4:36:10PM PST	Success	Posted	<a href="#">Details</a>

Step	Action
15.	<p>The <b>Process List</b> displays.</p> <p>Click the <b>Refresh</b> button until the Run Status reads "Success".</p> <p></p>
16.	<p>Click the <b>Details</b> link.</p> <p></p>



# Training Guide

## GR210 Managing Grant Awards

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Project Costing > Cost Collection > Payables

New Window ? Help Personalize Page http

### Process Detail

Process	
Instance	13689
Type	Application Engine
Name	PC_AP_TO_PC
Description	AP to PC Interface
Run Status	Success
Distribution Status	Posted

Run	
Run Control ID	APtoPC
Location	Server
Server	PSUNX
Recurrence	

Update Process

- ☐ Hold Request
- ☐ Queue Request
- ☐ Cancel Request
- ☐ Delete Request
- ☐ Restart Request

Date/Time	Actions
Request Created On 11/14/2012 4:19:03PM PST	<a href="#">Parameters</a> <a href="#">Transfer</a>
Run Anytime After 11/14/2012 4:18:57PM PST	<a href="#">Message Log</a> <a href="#">View Locks</a>
Began Process At 11/14/2012 4:19:30PM PST	<a href="#">Batch Timings</a>
Ended Process At 11/14/2012 4:20:14PM PST	<a href="#">View Log/Trace</a>

OK Cancel

javascript:submitAction\_win0(document.win0,PPMN\_DERIVED\_MESSAGELO...)

Step	Action
17.	<p>The <b>Process Detail</b> page displays.</p> <p>Click the <b>Message Log</b> link.</p> <p><a href="#">Message Log</a></p>

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Project Costing > Cost Collection > Payables

New Window ? Help Personalize Page http

### Message Log

Process	
Instance:	13689
Type:	Application Engine
Name:	PC_AP_TO_PC
Description:	AP to PC Interface

Severity	Log Time	Message Text	Explain
10	4:19:31PM	1 Row(s) Processed	<a href="#">Explain</a>
10	4:19:55PM	1 Row(s) Processed	<a href="#">Explain</a>
10	4:19:55PM	0 Summary Row(s) were Created	<a href="#">Explain</a>
10	4:20:01PM	0 transactions outside the period of performance during limit checking.	<a href="#">Explain</a>
10	4:20:05PM	Initializing process PC_BUD_SUM.	<a href="#">Explain</a>
10	4:20:05PM	PC_BUD_SUM has inserted 0 rows into PS_PC_BUD_SUMMARY.	<a href="#">Explain</a>
10	4:20:05PM	0 rows successfully written to Budget Summary table.	<a href="#">Explain</a>
10	4:20:06PM	Initializing process PC_BUD_SUM.	<a href="#">Explain</a>
10	4:20:06PM	PC_BUD_SUM has inserted 0 rows into PS_PC_BUD_SUMMARY.	<a href="#">Explain</a>
10	4:20:06PM	0 rows successfully written to Budget Summary table.	<a href="#">Explain</a>
10	4:20:09PM	Initializing process PC_BUD_SUM.	<a href="#">Explain</a>
10	4:20:09PM	PC_BUD_SUM has inserted 0 rows into PS_PC_BUD_SUMMARY.	<a href="#">Explain</a>
10	4:20:09PM	0 rows successfully written to Budget Summary table.	<a href="#">Explain</a>



Step	Action
18.	The <b>Message Log</b> displays.  Verify the Message Log for previously run processes.
19.	You have successfully completed the <i>Collecting Cost from Payables</i> topic.  You have learned how to: - Collect cost from expenses <b>End of Procedure.</b>

#### 4.2.2 Reviewing Vouchers Created for a Grant

Use the **Vouchers by Activity** page to view the resource transactions from a specific project and activity that contain a voucher ID. **NOTE:** You must run the AP to PC Interface process before you can view voucher transactions on the **Voucher by Activity** page.





After completing this topic, you will be able to:

- Verify that vouchers charged to a project have been collected into project costing.

#### Procedure

Use the Vouchers by Activity page to view the resource transactions from a specific project and activity that contain a voucher ID.

In this topic, voucher transactions previously created against a project activity will be viewed in project costing.

Step	Action
1.	Begin by navigating to the <b>Vouchers By Activity</b> page.  Click the <b>Project Costing</b> link. 
2.	Click the <b>Review Costs</b> link. 
3.	Click the <b>Accumulated Costs</b> link. 
4.	Click the <b>Vouchers by Activity</b> link. 



# Training Guide

## GR210 Managing Grant Awards

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu | Project Costing | Review Costs | Accumulated Costs | Vouchers by Activity

New Window http

### Vouchers by Activity

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

**Search Criteria**

Business Unit: = MDJUD

Project: begins with

Activity: begins with

WBS ID: begins with

Project Description: begins with

Activity Description: begins with

Activity Type: begins with


Status as of Effective Date: =

Activity Owner: begins with

New Milestone: =

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Step	Action
5.	<p>The <b>Vouchers by Activity</b> search page displays.</p> <p>Click the <b>Look up Project (Alt+5)</b> button.</p> 

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu | Project Costing | Review Costs

New Window http

### Vouchers by Activity

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

**Search Criteria**

Business Unit: = MDJUD

Project: begins with

Activity: begins with

WBS ID: begins with

Project Description: begins with

Activity Description: begins with

Activity Type: begins with

Status as of Effective Date: =

Activity Owner: begins with

New Milestone: =

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

#### Look Up Project

Business Unit: MDJUD

Project: begins with

Look Up Clear Cancel Basic Lookup

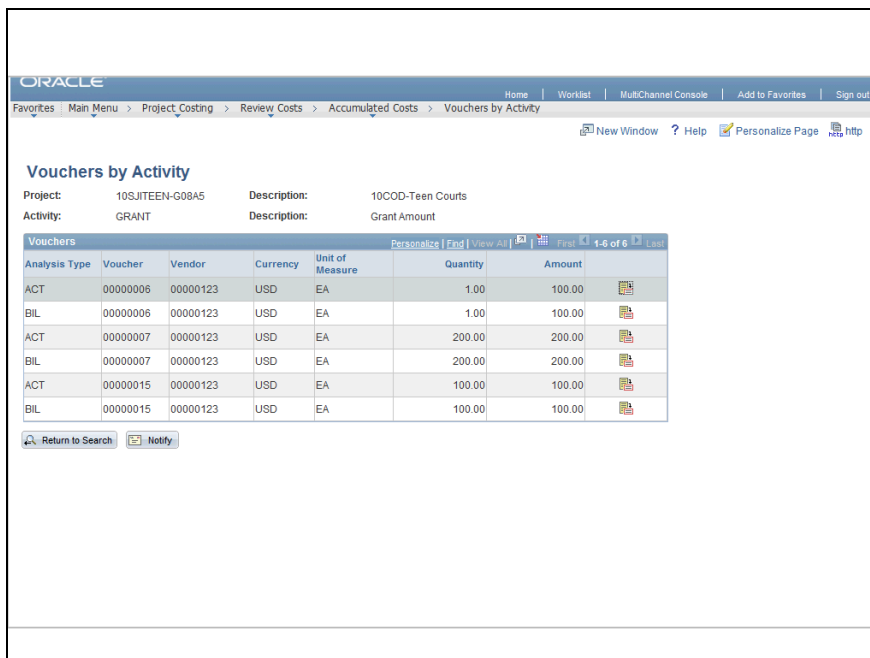
#### Search Results

View 100 First 1-39 of 39 Last

Project	Description
000000000000001	Grant Name
08DHRCSIFXG20F5	08DHR - Incentive Funds
09DHRCSIFXG26F5	09DHR - Incentive Funds
10SJMACROG11A5	10MACRO - Quality Improv
10SJITEENG08A5	10COD - Teen Courts
11DHRCSAXG17F5	11DHR - CRA IV D
11GOCPAWAG27F5	11GOCOP - DomVio
11HHSFCIPBG22F5	11FCCIP-Basic
11HHSFCIPDG23F5	11FCCIP-Data
11HHSFCIPDQ24F5	11FCCIP-Training
11QPPSPC-012A5	11QIP- Drug Courts
11OWJUDEDG21F5	11OWW- Judicial Training
11SHAACO-52449	11District Co- AA Co
11SHAOCO-53449	11District Co - Ho Co
11SHADR1G09A5	11COD - ADR Phase I
12SHAACO-52449	12District Co - AA Co
12SHAOCO-53449	12District Co - Ho Co
12SHADR2G13A5	12COD - ADR Phase II
GMPROJINTT01	David C Grant
JANE-TEST-FILE	TEST DESCRIPTION
JGR-DC-TEST01	Test DC Case Opnd
JGR-GMCAPO1	Test Grant Proposal to Award
JGR-NGPTST01	for ngples101
JGR-PCCAGM	Test PC to CA to GM Award
JGR-TESTPROJ01	Test Project 01
JGR-TESTTREE	Test Tree
JGR-TSTKKBUD02	JGR-TSTKKBUD02
JP-SECOND-TEST	SECOND DESCRIPTION



Step	Action
6.	<p>The <b>Look Up Project</b> page is displayed.</p> <p>Click the appropriate Project link. For this example, click <b>10SJITEENG08A5</b>.</p> <p><b>10SJITEENG08A5</b></p>
7.	<p>Enter the desired information into the <b>Activity</b> field. Enter a valid value. For this example, enter "<b>GRANT</b>".</p>
8.	<p>Click the <b>Search</b> button.</p> <p><b>Search</b></p>



The screenshot shows the Oracle Vouchers by Activity page. The breadcrumb trail is: Favorites > Main Menu > Project Costing > Review Costs > Accumulated Costs > Vouchers by Activity. The page title is "Vouchers by Activity". The Project is 10SJITEEN-G08A5 and the Activity is GRANT. The Description is 10COD-Teen Courts. The Grant Amount is displayed. A table of vouchers is shown with columns: Analysis Type, Voucher, Vendor, Currency, Unit of Measure, Quantity, and Amount. The table contains 8 rows of data. At the bottom, there are buttons for "Return to Search" and "Notify".

Analysis Type	Voucher	Vendor	Currency	Unit of Measure	Quantity	Amount
ACT	00000006	00000123	USD	EA	1.00	100.00
BIL	00000006	00000123	USD	EA	1.00	100.00
ACT	00000007	00000123	USD	EA	200.00	200.00
BIL	00000007	00000123	USD	EA	200.00	200.00
ACT	00000015	00000123	USD	EA	100.00	100.00
BIL	00000015	00000123	USD	EA	100.00	100.00

Step	Action
9.	<p>The <b>Vouchers by Activity</b> page displays.</p> <p>Vouchers created for the grant and related details are listed; including the voucher ID, vendor, quantity and amount for each voucher listed.</p>
10.	<p>You can view the voucher accounting entries using the <b>Voucher Accounting Entries</b> button at the end of a voucher row, if desired.</p>
11.	<p>You have successfully completed the <i>Reviewing Vouchers Created for Grants</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Navigate and review vouchers created for grants</li> </ul> <p><b>End of Procedure.</b></p>



## Lesson 5: Reviewing Grant Project Budget Activity

### Lesson Overview

GEARS Commitment Control helps you avoid overspending by providing budget checking and commitment accounting functionality. It can automatically check commitments and expenditures against control budgets, spot exceptions, freeze any affected transactions, and notify you of exceptions, enabling you to limit commitments and actual expenditures to authorized budget amounts. Because Commitment Control enables you to establish extensive and flexible budgetary controls, you can forecast the final costs of a grant project and take timely corrective action to avoid excessive deviations from the budget.

### Lesson Objectives

In this lesson, you will learn how to:

- Review grant project budget activity in GEARS Commitment Control

### 5.1 Reviewing Grant Project Budget Activity

Inquiring on specific transactions is extremely important for audit tracking purposes. Commitment Control gives you the ability to inquire on budget transactions that were entered directly into the General Ledger via commitment control. It also gives you the ability to narrow or widen your search as appropriate. If you are looking for a specific budget, you should enter as many known variables as possible.

Using the Commitment Control **Budget Overview** inquiry pages, you can verify the total grant project budget amount, total purchases and expenses created against a budget, and also monitor the remaining balance of the grant budget. You can also drill down further to review transactions such as requisitions, purchase orders and vouchers that have been created using grant project funds.

After completing this topic, you will be able to:

- Create a budget inquiry
- Verify the grant project budget in Commitment Control
- Drill down to view grant project budget activity

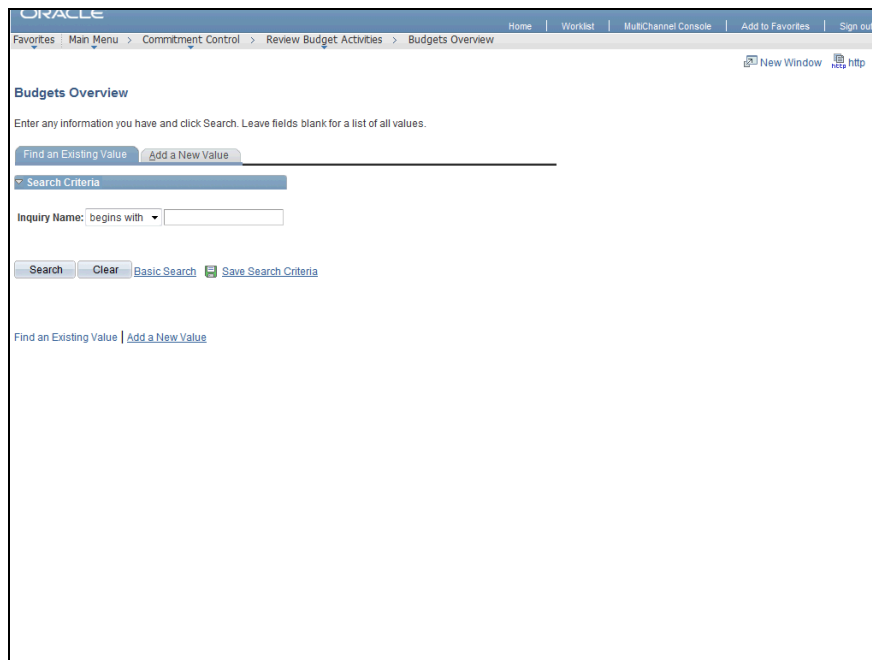
.

### Procedure

In this topic, you will create an inquiry to review a grant project's budget activity using the **Budget Overview** inquiry pages. You will also drill down to review grant project transaction details.



Step	Action
1.	<p>Begin by navigating to the <b>Budget Overview</b> inquiry page.</p> <p>Click the <b>Commitment Control</b> link.</p> <p><a href="#">Commitment Control</a></p>
2.	<p>Click the <b>Review Budget Activities</b> link.</p> <p><a href="#">Review Budget Activities</a></p>
3.	<p>Click the <b>Budgets Overview</b> link.</p> <p><a href="#">Budgets Overview</a></p>



Step	Action
4.	<p>The <b>Budget Overview</b> search page displays.</p> <p>Once you have created a budget inquiry, you can search for it using the <b>Find an Existing Value</b> tab.</p>
5.	<p>To create a new inquiry, click the <b>Add a New Value</b> tab</p> <p><a href="#">Add a New Value</a></p>



# Training Guide

## GR210 Managing Grant Awards



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

New Window http

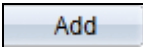
### Budgets Overview

Find an Existing Value | Add a New Value

Inquiry Name:

Add

Find an Existing Value | Add a New Value

Step	Action
6.	The <b>Add a New Value</b> tab displays.  Enter inquiry description into the <b>Inquiry Name</b> field.
7.	Click the <b>Add</b> button. 

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

New Window Personalize Page http

### Budget Inquiry Criteria

#### Budget Overview

Inquiry: GRANT\_PROJ Description:

Amount Criteria Search Clear Reset

Budget Type

\*Business Unit: MDJUD Ledger Group/Set: Ledger Group Ledger Group:

☐ View Stat Code Budgets  
☐ Display Chart

Time Span

\*Type of Calendar: Detail Budget Period

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	DETAIL		<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
	%	%			Update/Add


Save Notify Refresh

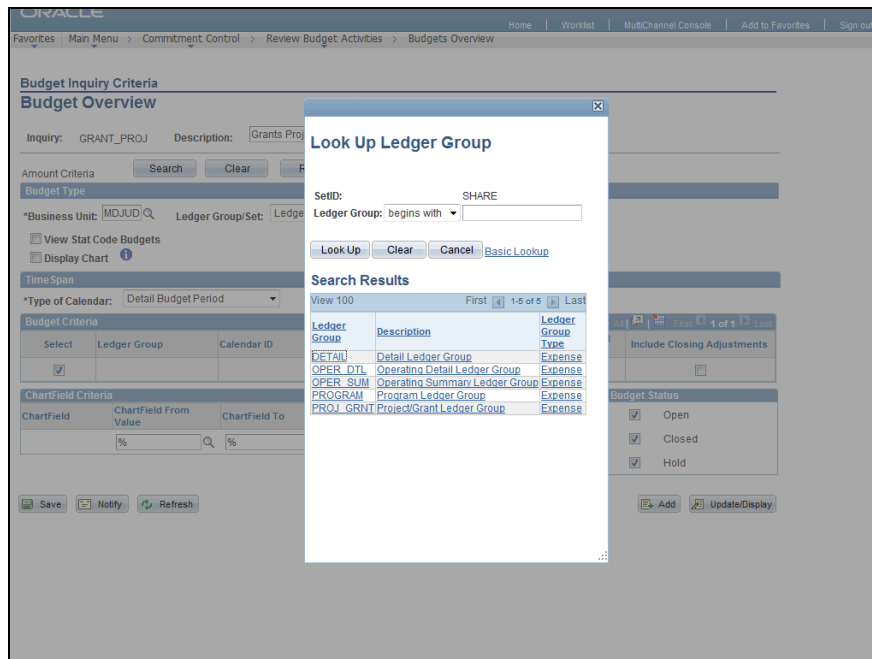
Add Update/Display

Budget Status

☒ Open  
☒ Closed  
☒ Hold



Step	Action
8.	<p>The <b>Budget Inquiry Criteria - Budget Overview</b> page displays.</p> <p>You must enter an inquiry (long) description and specify other budget criteria including business unit (MDJUD), ledger group, time span, budget periods, and grants Chartfield information.</p>
9.	Enter the long description for the budget inquiry into the <b>Description</b> field. For example, you can enter "Office of Problem Solving Courts Grants".
10.	<p>In the <b>Budget Type</b> section, verify the following:</p> <ul style="list-style-type: none"> <li>- the <b>Business Unit</b> field displays "MDJUD"</li> <li>- the <b>Ledger Group/Set</b> field displays "Ledger Group"</li> </ul>
11.	<p>Select a ledger group.</p> <p>Click the <b>Look up Ledger Group</b> button.</p> 



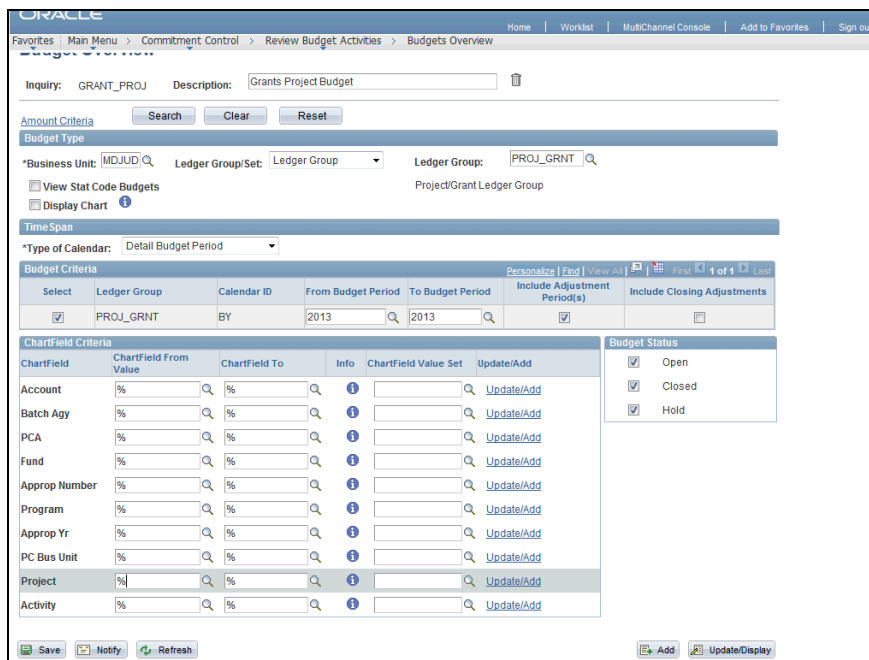
The screenshot shows the Oracle Budget Inquiry Criteria - Budget Overview page. The 'Look Up Ledger Group' window is open, displaying a table of search results. The table has three columns: Ledger Group, Description, and Ledger Group Type. The results are as follows:

Ledger Group	Description	Ledger Group Type
DETAIL	Detail Ledger Group	Expense
OPER DETL	Operating Detail Ledger Group	Expense
OPER SUM	Operating Summary Ledger Group	Expense
PROGRAM	Program Ledger Group	Expense
PROJ GRNT	Project/Grant Ledger Group	Expense

Step	Action
12.	<p>The <b>Look Up Ledger Group</b> window displays.</p> <p>The ledger group used for projects/grants is <b>Project/Grant Ledger Group (PROJ_GRNT)</b>.</p> <p>Click the <b>Project/Grant Ledger Group</b> link.</p>

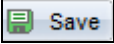
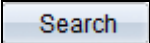


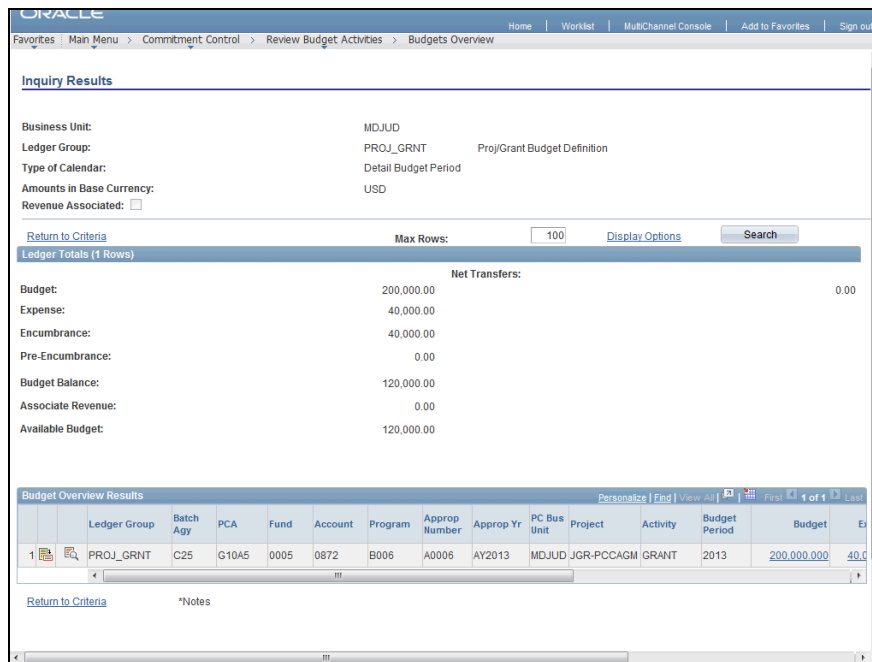
Step	Action
13.	<p><b>Type of Calendar</b> field specifies how you will view budget information. You will view budget information by budget year.</p> <p>Verify that the <b>Type of Calendar</b> field displays "Detail Budget Period".</p>
14.	<p>In the <b>Budget Criteria</b> section, select the budget period(s) for which you want to view budget information.</p> <p>Enter / select budget period values in the <b>From Budget Period</b> and <b>To Budget Period</b> fields.</p> <p><b>NOTE:</b> The fields available in the Budget Criteria section are dependent on the calendar selected.</p>
15.	In this example, you will view budget information for a grant project created for budget period 2013.



Step	Action
16.	<p>Specify the specific grant project budget(s) you want to view in the <b>Chartfield Criteria</b> section.</p> <p>Enter the Project ID into <b>Chartfield From Value - Project</b> and <b>Chartfield To - Project</b> fields.</p>
17.	You can narrow your result further by entering other Chartfield information, such as PCA or Account (if desired).



Step	Action
18.	Click the <b>Save</b> button. 
19.	<b>NOTE:</b> After saving your budget inquiry you can retrieve it for future use. Navigate to the <b>Budget Overview - Find an Existing Value</b> page to search for and use the budget inquiry.
20.	Click the <b>Search</b> button to retrieve a budget inquiry results based on the criteria selected. 



The screenshot shows the Oracle Budget Overview page. The top navigation bar includes links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. The breadcrumb trail is: Favorites > Main Menu > Commitment Control > Review Budget Activities > Budgets Overview.

**Inquiry Results**

Business Unit: MDJUD  
 Ledger Group: PROJ\_GRNT  
 Type of Calendar: Detail Budget Period  
 Amounts in Base Currency: USD  
 Revenue Associated: ☐

Buttons: [Return to Criteria](#), Max Rows: 100, [Display Options](#), [Search](#)


**Ledger Totals (1 Rows)**

		Net Transfers:
Budget:	200,000.00	0.00
Expense:	40,000.00	
Encumbrance:	40,000.00	
Pre-Encumbrance:	0.00	
Budget Balance:	120,000.00	
Associate Revenue:	0.00	
Available Budget:	120,000.00	

**Budget Overview Results**

	Ledger Group	Batch Agy	PCA	Fund	Account	Program	Approp Number	Approp Yr	PC Bus Unit	Project	Activity	Budget Period	Budget	Encumbrance
1	PROJ_GRNT	C25	G10A5	0005	0872	B006	A0006	AY2013	MDJUD	JGR-PCCAGM	GRANT	2013	200,000.00	40,000.00

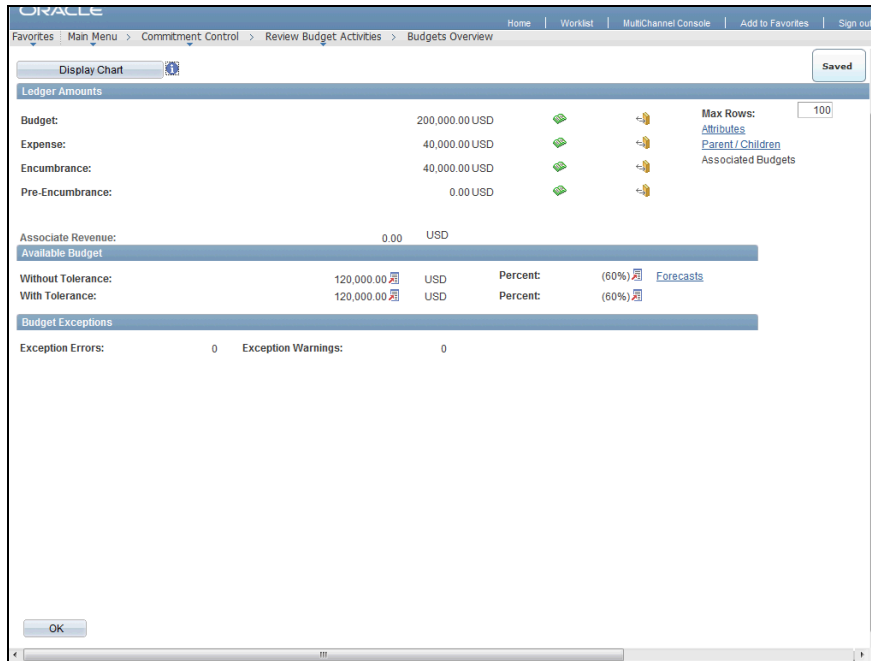
Buttons: [Return to Criteria](#), \*Notes

Step	Action
21.	The <b>Inquiry Results</b> page displays.  In the <b>Ledger Totals</b> section, review grant project budget ledger totals for all budget selected on the Overview, as well as detail ledger amounts for each budget, summarized by budget period and the ChartFields you selected.
22.	Move the scrollbar to the right.
23.	Click the <b>Show Budget Details</b> button. 



# Training Guide

## GR210 Managing Grant Awards



Oracle Budgets Overview

Display Chart

Ledger Amounts

Budget:	200,000.00 USD				
Expense:	40,000.00 USD				
Encumbrance:	40,000.00 USD				
Pre-Encumbrance:	0.00 USD				

Associate Revenue: 0.00 USD


Available Budget

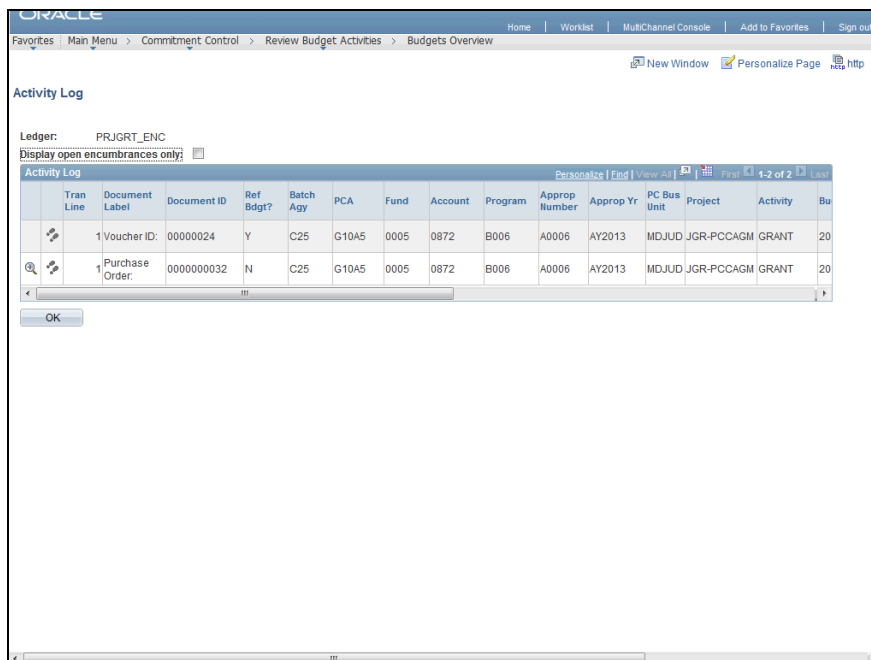
Without Tolerance:	120,000.00 USD	Percent:	(60%)	Forecasts
With Tolerance:	120,000.00 USD	Percent:	(60%)	

Budget Exceptions

Exception Errors:	0	Exception Warnings:	0
-------------------	---	---------------------	---

OK

Step	Action
24.	<p>The <b>Budget Details</b> page displays.</p> <p>Click the <b>Drill to Activity Log</b> button.</p> 



Oracle Activity Log


Ledger: PRJGRT\_ENC

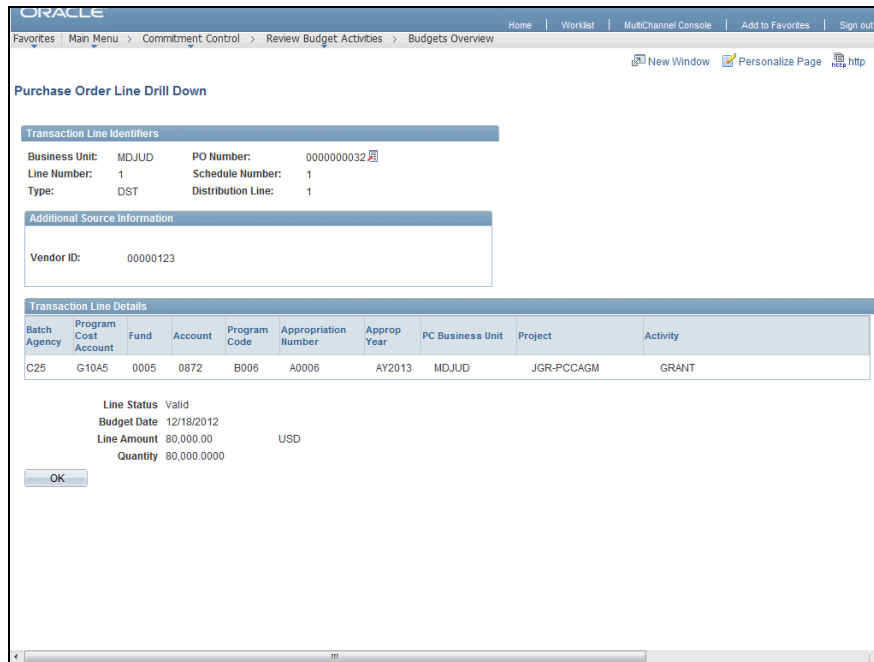
Display open encumbrances only: ☐

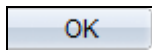
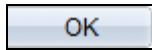
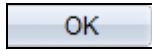
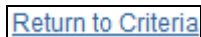

Tran Line	Document Label	Document ID	Ref Bdg?	Batch Agy	PCA	Fund	Account	Program	Approp Number	Approp Yr	PC Bus Unit	Project	Activity	Bu
1	Voucher ID:	000000024	Y	C25	G10A5	0005	0872	B006	A0006	AY2013	MDJUD	JGR-PCCAGM	GRANT	20
1	Purchase Order:	0000000032	N	C25	G10A5	0005	0872	B006	A0006	AY2013	MDJUD	JGR-PCCAGM	GRANT	20

OK



Step	Action
25.	<p>The <b>Activity Log</b> displays.</p> <p>Click the <b>Drill Down</b> button.</p> 



Step	Action
26.	<p>The <b>Purchase Order Line Drill Down</b> page displays.</p> <p>Click the <b>OK</b> button.</p> 
27.	<p>Click the <b>OK</b> button.</p> 
28.	<p>Click the <b>OK</b> button.</p> 
29.	<p>To continue reviewing more Project Grant information, click the <b>Return to Criteria</b> link.</p> 
30.	<p>Click the <b>Search</b> button to retrieve commitment control overview of the chartfield criteria selected.</p> 



# Training Guide

## GR210 Managing Grant Awards

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu | Commitment Control | Review Budget Activities | Budgets Overview

New Window | Help | Personalize Page | http

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**Inquiry Results**

Business Unit: MDJUD  
 Ledger Group: PROJ\_GRNT Proj/Grant Budget Definition  
 Type of Calendar: Detail Budget Period  
 Amounts in Base Currency: USD  
 Revenue Associated: ☐

[Return to Criteria](#) Max Rows: 100 [Display Options](#)

**Ledger Totals (1 Rows)**

		Net Transfers:	
Budget:	110,000.00		0.00
Expense:	0.00		
Encumbrance:	0.00		
Pre-Encumbrance:	0.00		
Budget Balance:	110,000.00		
Associate Revenue:	0.00		
Available Budget:	110,000.00		

---

**Budget Overview Results**

Personalize | Find | View All | First | 1 of 1 | Last

	Ledger Group	PCA	Fund	Account	Program	Approp Number	Approp Yr	PC Bus Unit	Project	Activity	Batch Agy	Budget Period	Budget
1	PROJ_GRNT	00006	0005	0872	G08A	A0006	AY2013	MDJUD	A0CPROJECT#	GRANT	C00	2013	<a href="#">110,000.000</a>

[Return to Criteria](#) \*Notes

Step	Action
31.	<p>The <b>Inquiry Results</b> page displays.</p> <p>If you wish to see more details about the budget you have selected, click the <b>Budget Amount</b> link.</p>
32.	<p>To continue reviewing more Project Grant information, click the <b>Return to Criteria</b> link.</p> <p><a href="#">Return to Criteria</a></p>
33.	<p>You have successfully completed the <i>Reviewing a Grant Project Budget</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Review a grant project budget</li> </ul> <p><b>End of Procedure.</b></p>



## Course Summary



### **Congratulations!**

You have successfully completed the course. In this course, you have learned how to:

- Create a Grant Proposal
- Generate a Grant Award
- Update the Award Budget
- Update the Grant Project and Project Activities
- Track Grant Costs
- Review the Project Budget in Commitment Control - Budget Overview

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at <http://courtnet/gears/index.html> (<http://courtnet/gears/index.html>).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at [gears@mdcourts.gov](mailto:gears@mdcourts.gov) (<mailto:gears@mdcourts.gov>).